

# Festivals' needs and commitments

## Report on the occasion of the **COVID-19** survey

April - May 2020

## Survey: Festivals' needs and commitments

The shutdown caused by COVID-19 is having dramatic consequences for all cultural and creative sectors and within the sector festivals particularly. The survival of many festivals is at stake.

Many surveys on a national level have already been led, analysing the impact and challenges of the cultural and creative sector and the measures taken by Governments.

Because festivals have their own specificities, the European Festivals Association (EFA) has conducted the survey "Festivals' needs and commitments" to gather as much information as possible so that festivals can be together, inspire each other by sharing best practices and to guide EFA's response to provide an accurate picture to governments and other funders about the needs of festivals.

All festivals' stakeholders have to assume the major task of emphasising the necessity of the arts in our lives and to commit to their revival. This commitment also needs to result in increased financial support for the sector. EFA will focus on bringing the 'enabling' stakeholders together that contribute to this commitment and work towards the artists, the arts and the audiences in the near future. Among them there will be sponsors, cities, national governments, EU representatives and other stakeholders. All will be invited to dialogue with the festivals community, artists as well as concert halls, theaters and other artistic and cultural networks.

EFA would like to thank all festivals that took the time to answer the survey, as well as the EFFE Hubs (Europe for Festivals, Festivals for Europe) that have played an important role to disseminate the questionnaire in their respective country and the festival colleagues who have shared the questionnaire around them. EFA also addresses a special thanks to the Budapest Observatory, especially to Péter Inkei and Zsuzsanna Hunyadi, who has helped EFA in processing, analysing and interpreting the data collected.

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## 1. On the survey

The survey “Festivals’ needs and commitments” was launched on 7 April 2020 and closed on 31 May 2020. In total, we have gathered more than 220 answers among which 208 were valid (we had duplicates and decided to keep one answer per organisation). The present report highlights the answers of 208 different festivals at this very difficult time.

The questionnaire included 15 questions: 10 questions were to articulate the challenges festivals are facing; 5 other questions were to collect peer-to-peer inspiration and best practices for festivals to learn from and how they envisioned the way forward after this crisis. Finally a last section was dedicated to the organisations even if it was decided to keep the name of the festivals anonymous.

The survey has been sent to EFA’s communities: EFA members, EFFE Hubs, festivals registered on FestivalFinder.eu website among which the EFFE Labels, and the alumni of The Festival Academy. EFA has also shared it on its social media channels. The EFFE Hubs have also played an important role to disseminate the questionnaire in their respective county.

Festivals from 37 countries took part in the survey (see list in the Annex). With the exception of Latvia and Luxembourg, festival organisers from each EU member state were involved, and we had participants from 12 more countries (sadly, the 9 festivals from the United Kingdom appearing in this group). We were pleased to read responses coming from Canada, Lebanon and Turkey, in addition to accession countries and parties to the Eastern Partnership. For a few instances of regional comparison, the countries were divided into 11 groups, created ad hoc for convenience sake. (For example, the “EU East” group comprises 29 festivals from BG, RO, HR, SI, GR, MT.)

## 2. The main features of European art festivals

The survey has not been based on a representative sample of European art festivals. The broad spread of the responses which represents a satisfactory geographical balance, offers nevertheless a useful cross section about the current characteristics of the festival scene. The respondents were not required to identify themselves by genre but apparently classical music festivals are the majority. Next to them festivals active in other fields of culture - theatre, film and visual art - also responded to the

questionnaire. By status, non-profit organisations and cultural entrepreneurs were represented as well as a small number of public institutions as festival organisers.

We shall see that the issue of ticket sales plays a critical role when the events are cancelled – in this connection the relatively high number of festivals with free programmes deserves attention. 13% of the respondents explicitly stated that their programmes, or their majority are free, and the total share is probably even higher.

More and more festival organisers arrange more than one festival. A considerable number of responses therefore communicated the situation of multiple events, although this was explicitly stated occasionally only (posing a challenge both to the respondent and to the interpreter of the answers).

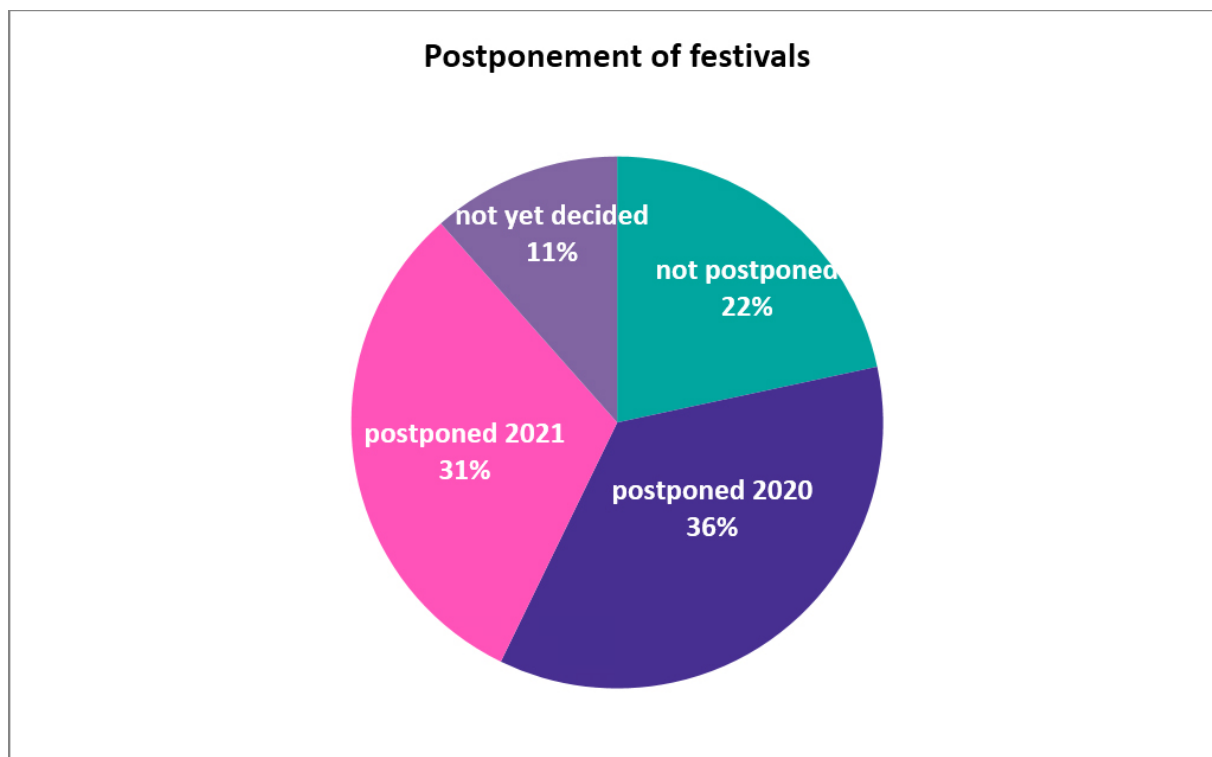
The size or number of festivals is not closely linked to the number of staff of the organisation in charge. The largest structure behind a respondent comprises 550 staff members while several festivals are run by one permanent official. The average size of the participating organisations in the survey was 14, but the typical case (the median) was 5 people.

88% of the festivals that answered the questionnaire have mentioned they are running outreach programmes next to their artistic programmes to include more citizens into the festival. These outreach programmes have a social and educational function. They are also used for audience development and community based work. Festivals contribute to citizens' well-being and the fact that a large majority of festivals put in place these kind of actions proves this affirmation.

### **3. The nature of the pandemic damages**

One of the most important findings of the survey is that the primary damage of the pandemic situation is the lack of certainty. This uncertainty brought about by the Covid pandemic, but it brought to light a more general state of vulnerability. Expressions of concern and uncertainty abound in almost all responses, including the few whose festival may be held in the original date (in the autumn or winter, unless the virus returns), and certainly in the case of 70% of the participants in the survey, who already shared a kind of relative "certainty" because their festivals had already been cancelled or postponed. An additional 11% was still "thinking about different options (postponement and cancellation)" at the time of the survey. Practically none of them could be certain about the date or the fate of the new edition of the festival.

**Graph 1**



One more aspect of uncertainty is that the majority, 57% is not sure they can organise their festivals in 2021 unless they receive a firm pledge about public subsidies. Since in normal conditions by this time of the year the basics of the following year's programme are put down, and preliminary adjustment with the artists is done, this level of insecurity is alarming.

A few selected quotes illustrate the state of mind of the survey's participants. (Minor corrections were administered in the spelling of the original.)

*"We still do not know if we could do some of the intended events later on during the year - though it is looking unlikely." (MT)*

*"The next edition will be in 2021, but only if this is possible according to government rules." (NL)*

*"At the current state of emergency, the general situation is very uncertain." (IT)*

*"Right now we have no idea if we can organise it or not, how the pandemic itself will affect our country in the coming weeks and months, or when it passes, what safety*

*measures will still be in effect.” (HU)*

*“Everything depends on the kind of restrictions. If the restrictions will include the closure of borders and the foreign guests will be not able to come, we will consider only the national edition of the festival.” (PL)*

*“If the social distance measures are still valid, we would probably have to cancel all concerts.” (CZ)*

*“We’re awaiting governmental decisions on this matter.” (BE)*

*“We don’t really have an idea to when to postpone due to complexity in funding and availability of resources in my country.” (HR)*

*“The decision will be given in two weeks if there is no change in the national restrictions.” (FI)*

*“We are in uncertainty now, waiting for decisions from city authorities and sponsors.” (UA)*

*“At the moment we have no certainties about being able to do the festival.” (IT)*

*“We can use part of the city and state grants to cover that loss. We will have to return the rest. Hopefully, we will get those grants approved for next year’s edition.” (CZ)*

*“It’s nearly impossible to start planning/re-scheduling now, when we don’t know the basic dates: when concerts will be possible again, when the borders open, what kind of restrictions will be put in place etc. There is no solid ground we could base our work on.” (PL)*

*“The current situation has only exposed even more (we already knew it), that the cultural sector is very fragile. There is a dark future ahead of us.” (ES)*

## 4. Dimensions of the damage

Defaulted (missing, foregone) revenue occupies the first place in the components of the deficit caused by the emergency situation. The damage represents a broad scale. Beyond the missing income from tickets, subsidies, sponsorship and donations, quite a few responses pointed at other types of lost revenue. Commercial deals about catering, revenues coming from advertisers, or in some cases fees expected from organisers and participants of workshops and master classes appeared in the sentences describing the impact of the pandemic.

The respondents also listed cases of already spent and wasted expenditure, as well as the challenges of contracts to settle with artists and all partners in preparing and running the event.

Several of the respondents rightly reminded about the fact that the scale of the damage goes beyond the deficits in the festival budget.

*"The main loss is for the local community because they will not have the public in the streets during festival."* (PT)

*"The loss will be for the artists and staff and also for the enterprises of the island, which would have an extra income from visitors."* (GR)

The following rank list can be drawn from the responses that graded the various kinds of financial damages. The absence of box office revenue is reported as the most important deficit, followed by the non-arrival of government subsidies.

1. Ticket revenue lost
2. Government subsidies
3. Sponsorship
4. Municipal, regional subsidies
5. Other (e.g. commercial income or workshop fees)
6. International subsidies

Uncertainties and insecurities prevented the respondents from expressing the size of their foreseeable losses in exact figures – financial data belong to the sensitive domain anyway. Euro amounts in themselves, without relating them to other indicators of the events are little informative. Nevertheless, more than half of the participants gave estimates about their losses in euro (which included defaulted revenue and



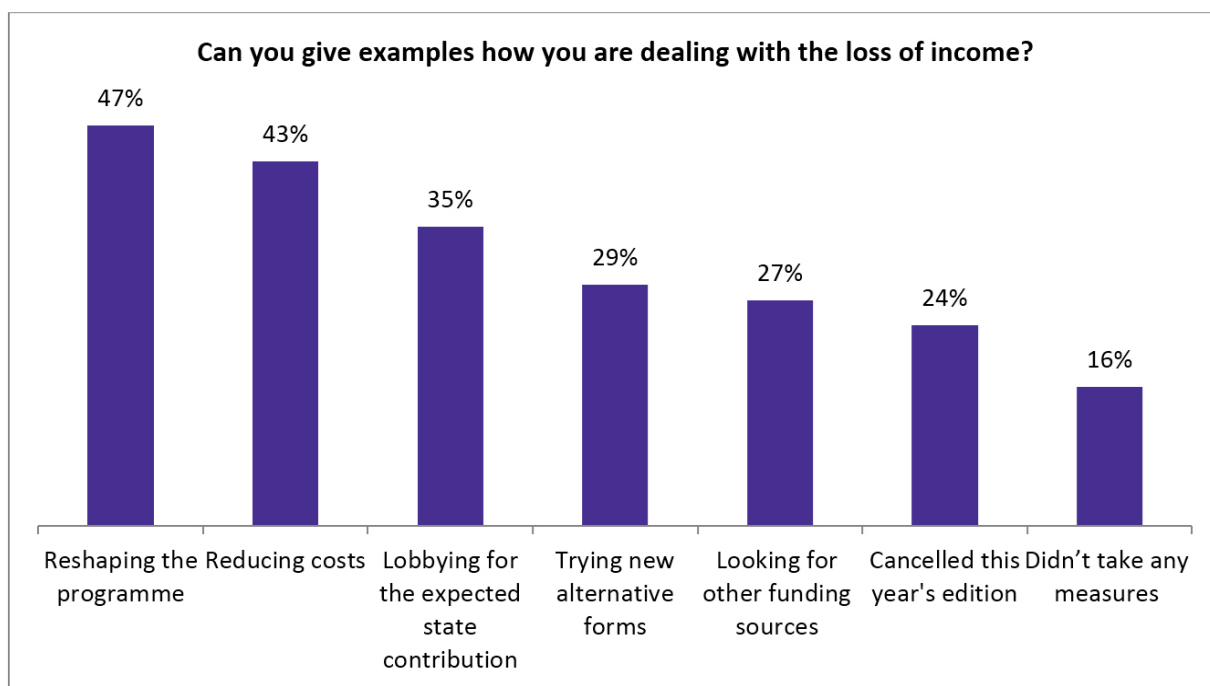
wasted expenditure).

The span is telling about the great variety of the festival scene, as it ranged from 3 billion down to losses in the neighbourhood of a thousand euro. (The average value of the estimated losses was 150 thousand, and the median is 40 thousand euro.)

## 5. Handling the losses caused by the pandemic

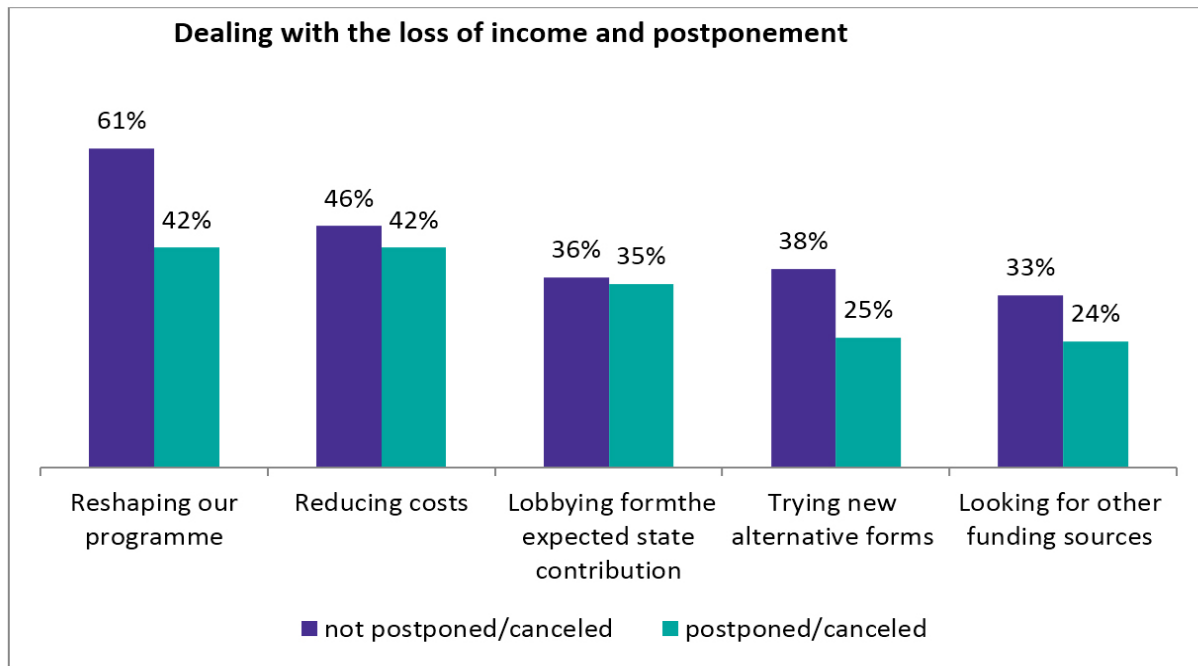
The festivals reported about a variety of reductions that were carried out under the pressure of the pandemic. The range includes shrinking the programme, the relinquishing from international performers, hiring fewer technicians etc. Reshaping the programme was the most favoured option, appearing in 47% of the answers.

**Graph 2**



Among those, who were not (yet) compelled to cancel or postpone this year's festival the willingness to adapt the programme to the circumstances was quite high (61%), and they were also more inclined to try new forms than was the case where the festivals had already been called off.

**Graph 3**



A few quotes from the comments on handling the losses:

*"We already execute our programme at ascetic level concerning the planning, organization and staff, so this loss cannot be compensated by a reduction of costs." (SI)*

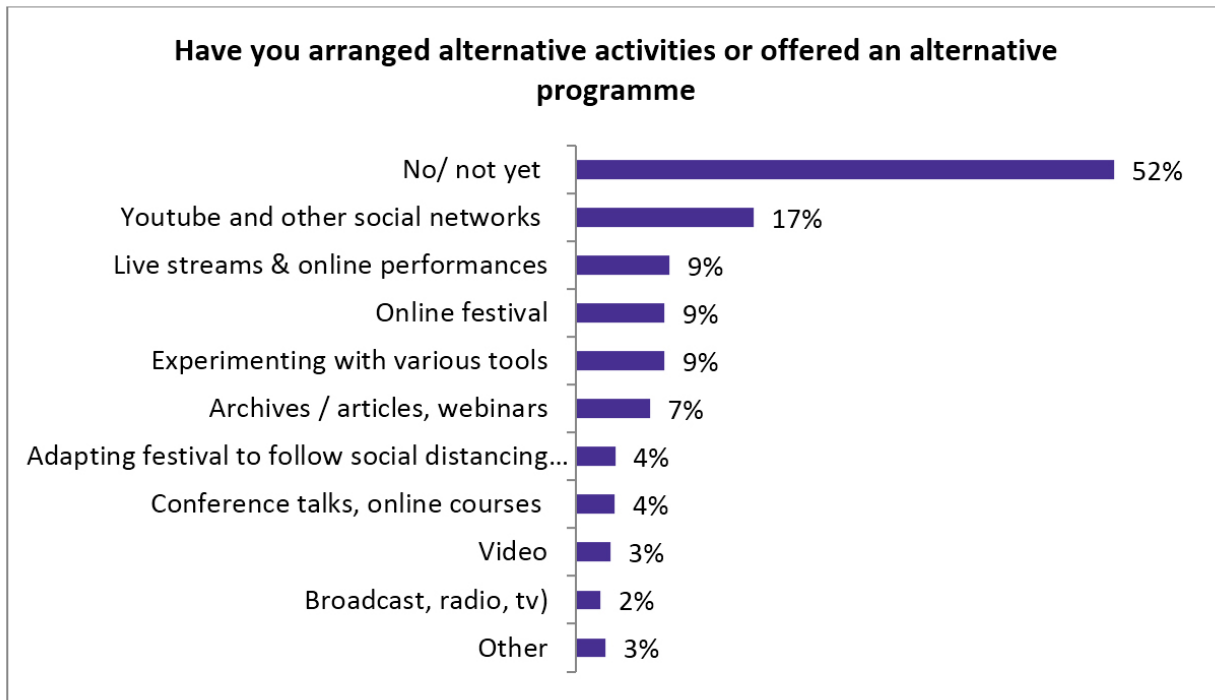
*"We just pay the loss ourselves and hope for the best." (HU)*

*"We asked our audience to not reclaim the money of their tickets: change for another one or leave it like it is." (BE)*

## **6. An array of alternative solutions**

The extraordinary circumstances have elicited an enormous variety of way to communicate with the audience of the festivals. All kinds of instruments and channels offered by the latest technologies were involved. At the time of the survey, however, the great majority of the participants had not resorted to alternative solutions.

**Graph 4**



Other solutions were also mentioned:

*"Communication and exchanging ideas are very necessary during the crisis. Over the internet we are staying in contact with our partners, sharing constantly ideas and thinking about solutions and common projects."* (IT)

*"We cancelled all planned projects and will organize alternative models in public space, guerilla concerts, bell tower concert and projects for the internet."* (DE)

## **7. Assistance received or expected**

Against the abundant variety of inventive responses that the festivals give to the emergency situation, and differently from the wealth of thoughts about the legacies of the current crisis, the role of EFA and other international bodies is conceived in a one dimensional manner. The despair caused by the Covid pandemic made festival organisers focus one-sidedly on various forms of financial assistance. In an overwhelming majority their relevant answers suggest that the professional associations should primarily lobby for guaranteed subsidies, effective grant programmes, tax exemptions and so on. The European Commission – which is probably the indirect

addressee – cannot realistically take charge of the financial queries of art festivals in Europe as desired in these responses.

*"We sincerely hope that Europe could install a kind of Marshall plan for the festivals." (BE)*

*"Encourage regulations at an EU level to resolve issues inherent to precarious activity sectors, such as culture." (PT)*

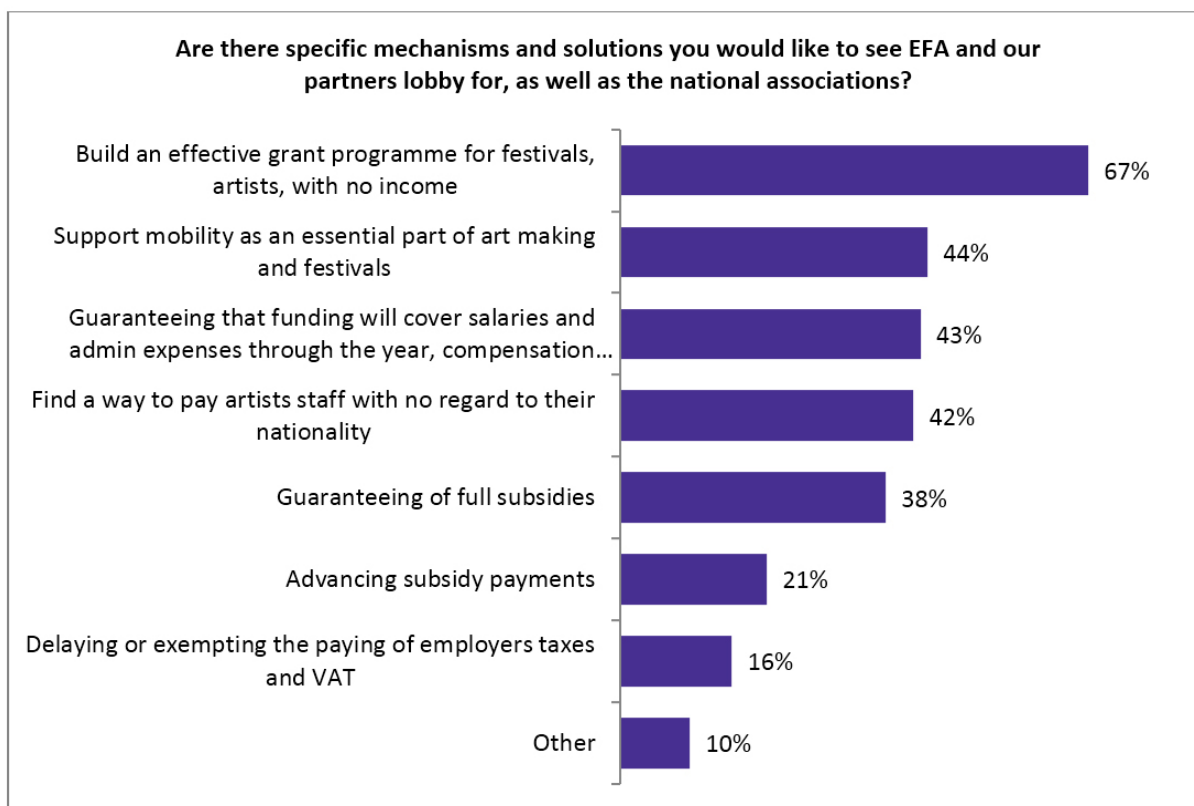
*"I would like EU to realize the importance of the cultural sector, the benefits it brings so much mentally, morally, as well as financially and to realize a real support program of the cultural sector." (RO)*

*"In the future we hope that European culture ministration will help more in this kind of difficult situations. Also, EU must push all of the EU countries to help more easily cancelled festivals etc." (FI)*

*"It would be useful to start taking a path towards recognition and census, perhaps with special registers, of the European realities and festivals that offer and produce culture. Maybe favouring European funding that with new ad hoc calls that guarantee the 'life' of structures and workers, whose use and financing is always indispensable." (IT)*

Different is the case with mobility, stressed also in the survey, which is already high on the EU agenda.

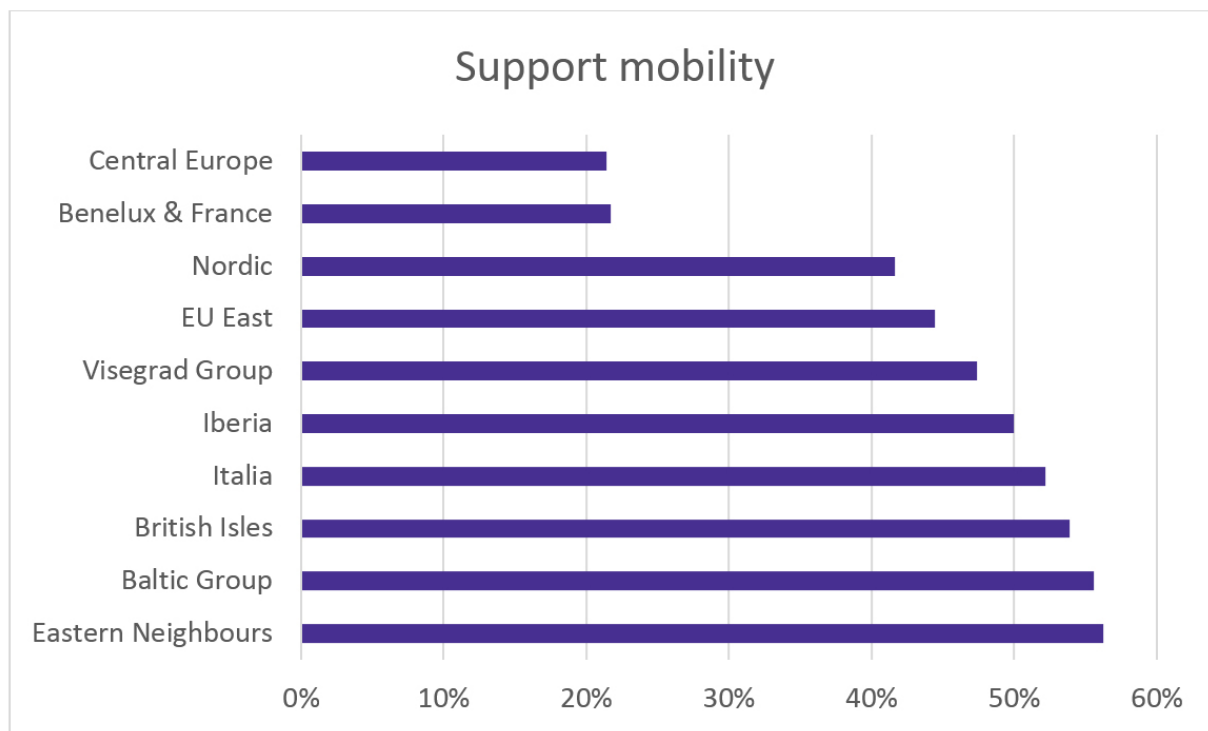
**Graph 5**



The trust that the festival organisers feel towards EFA finds expression in the large number of participants in the survey; many respondents were more explicit and included words of thanks and gratefulness among the “any other comments” to the questionnaire. It needs to be brought home, however, that the role and potential of the Association is more nuanced than lobbying for more money to the festival sector. The survey, in its entirety, has brought to surface plenty of “needs and commitment” of festivals that determine the goals that the festival community should be advocating for, beyond the issue of public subsidies.

The countries to the east from the Union chose the most realistic wish – continued accent on the promotion of cultural mobility – in the greatest proportion, while less than 22% of festival organisers from the middle of the continent (from France to Austria) marked this option, focusing more on financial expectations.

**Graph 6**



The survey brought to light very limited instances of targeted assistance that festivals had received by the time of responding. Special credit is therefore due to the sporadic mentions about such help:

*"The government is giving us a small income."* (ES)

*"...thanks to updated regulations on the subsidies from the Ministry of Culture and other institutions..."* (PL)

The answers given to the question about fiscal exemptions to private (business) assistance to culture are indeed not closely related to the pandemic situation. They nevertheless offer a snapshot on this issue, which basically appears to suffer from negligence. The majority marked a laconic yes or no or admitted lack of familiarity with the matter. Very few respondents gave precise answers. A Finnish participant pointed out the fundamental difference between sponsorship ("mutual cooperation") and donation (philanthropy), which latter is subject to tax deductions only. Most of the responses used the two terms interchangeably.

From the few answers relating to sponsorship we learn that:

*"Companies these days are more eager to help hospitals." (RO)*

*"Not interested in sponsoring early music." (NL)*

*"It's a struggle to get support for this kind of festival." (PT)*

Festivals in some eastern countries feel political discrimination towards them also in this context.

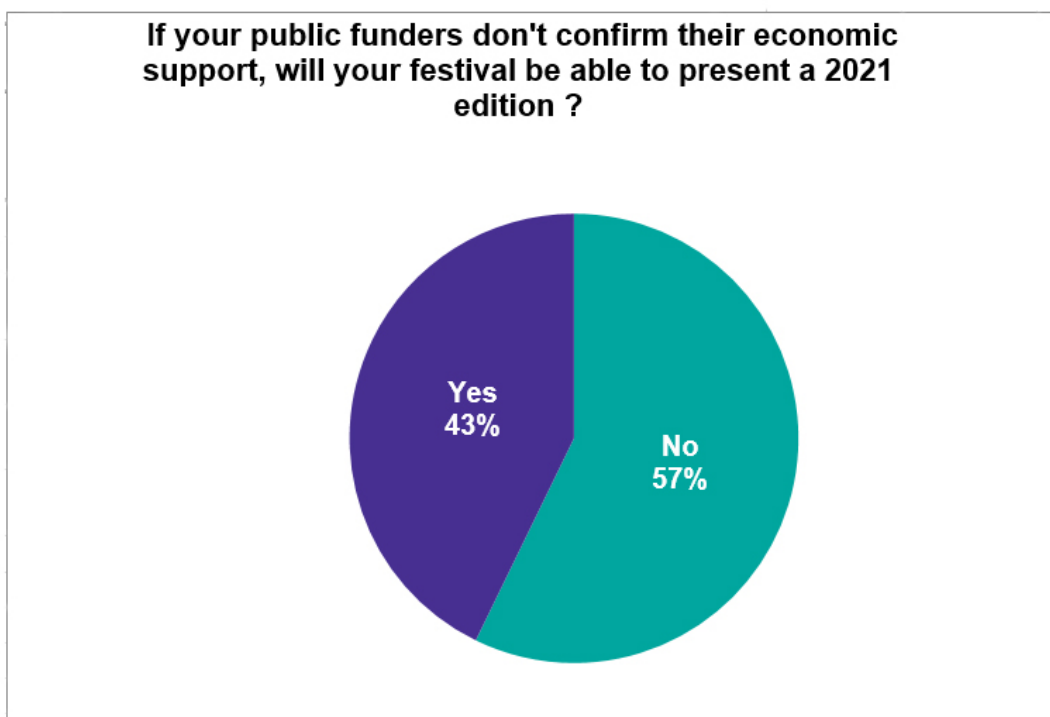
The classical charity regimes appear to operate normally in a few places (UK, IE, EE), and as many as five responses mentioned the Italian Art Bonus:

*"A tax credit equal to 65 % of charitable contributions that individuals or companies make in favour of public cultural heritage." (IT)*

## 8. Future

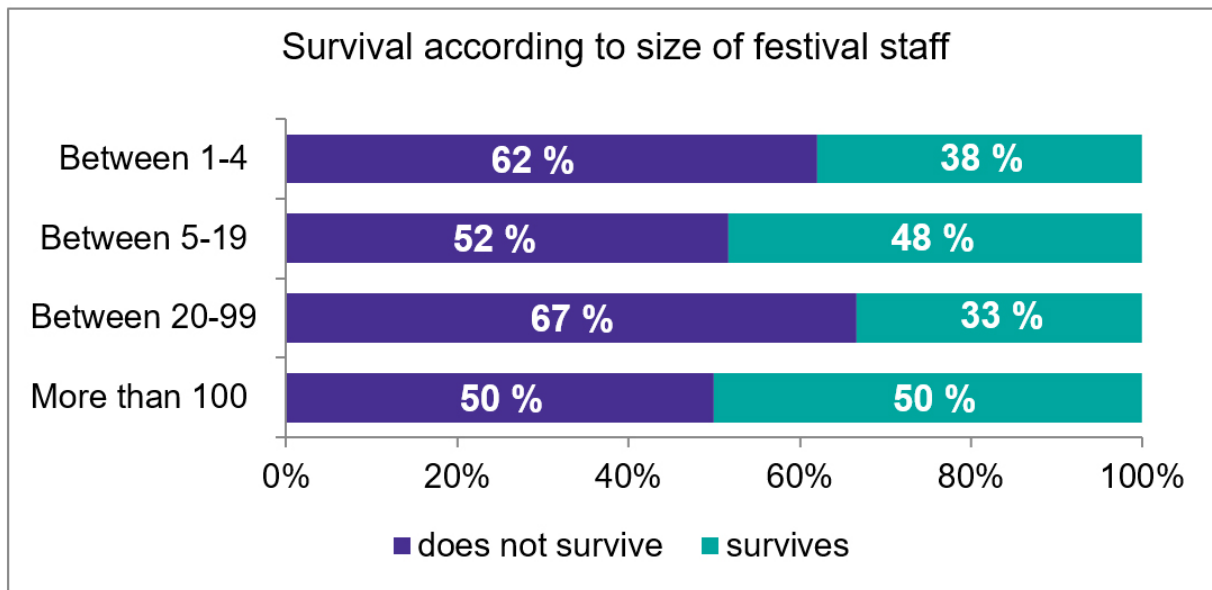
Beside the size of this financial blow, the critical question is what this crisis means to the future of the festivals.

### Graph 7



Chances of survival without guaranteed public support do not seem to depend on the size of the organisation in charge of the festival.

**Graph 8**

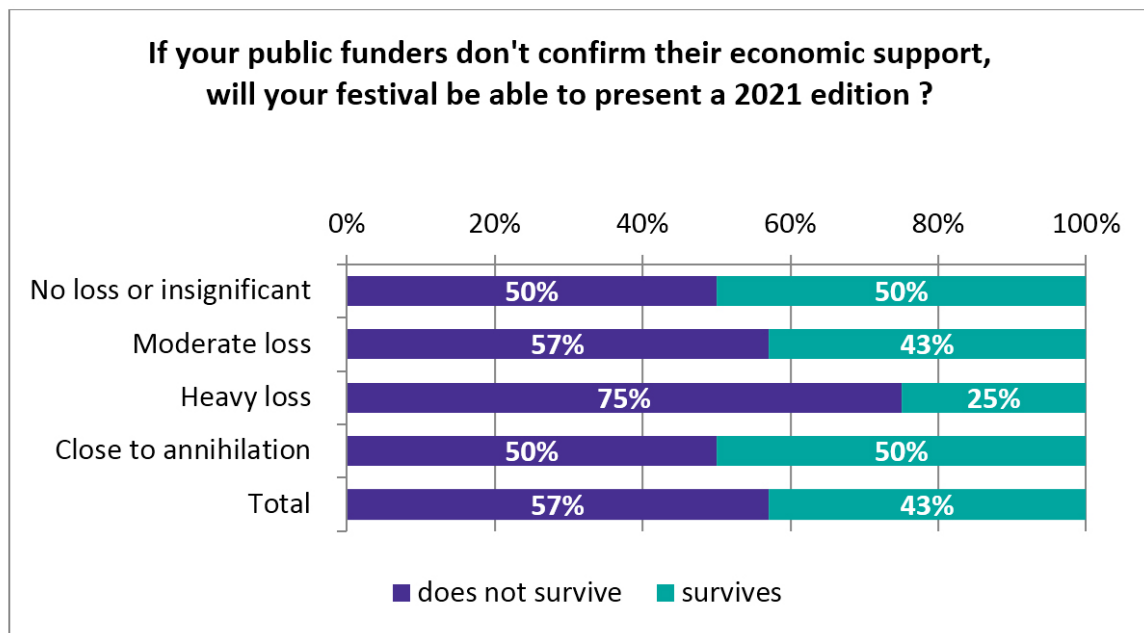


Based upon what the participants wrote about the foreseeable losses expressed partly in euros and partly with words (about two thirds of them provided such estimates), four groups could be identified according to the dimensions of their perceived damages due to the crisis.

Those festivals that have suffered the most serious losses during the crisis are the most pessimistic about their future: 75% cannot survive without guaranteed government support.

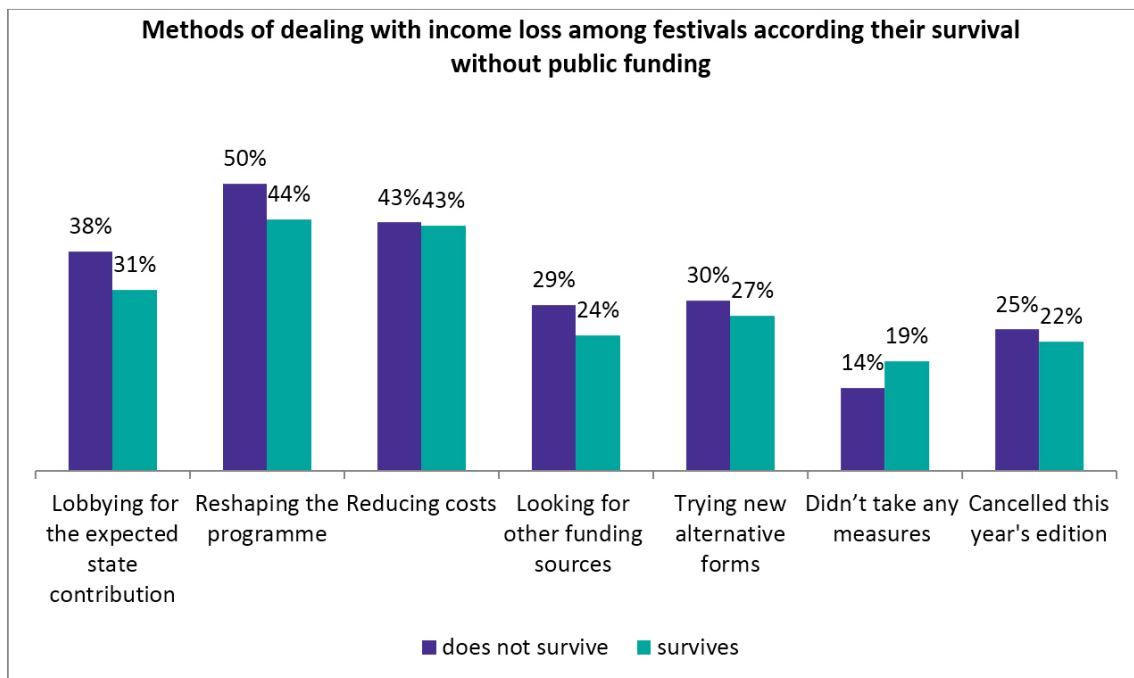


**Graph 9**



The main difference between festivals that would not survive without guaranteed subsidies and those that would is that the first group is more willing to reshape its programme (50% vs 44%); they would also focus more on lobbying for state subsidies.

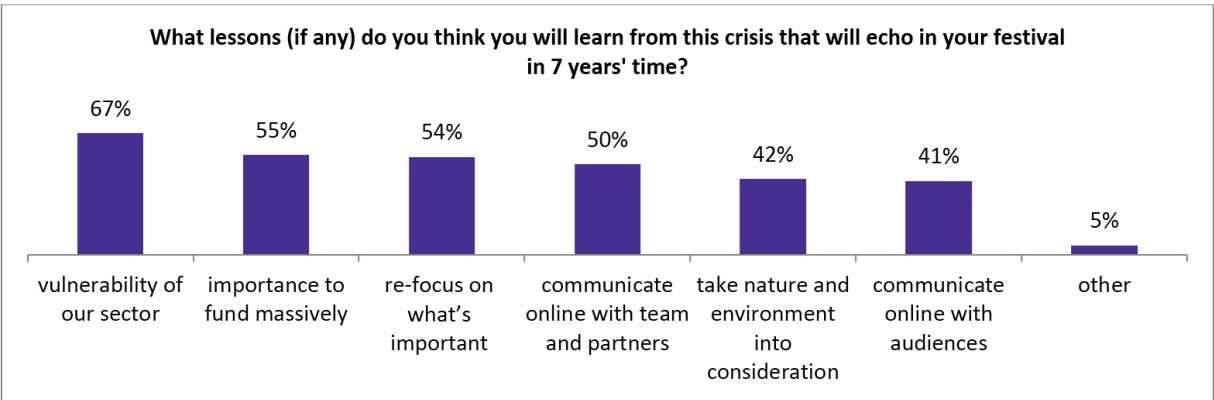
**Graph 10**



## 9. Lessons for the festivals

Upon the question “What lessons (if any) do you think you will learn from this crisis that will echo in your festival in 7 years’ time?” over two thirds of the participants chose the issue of vulnerability at the first place.

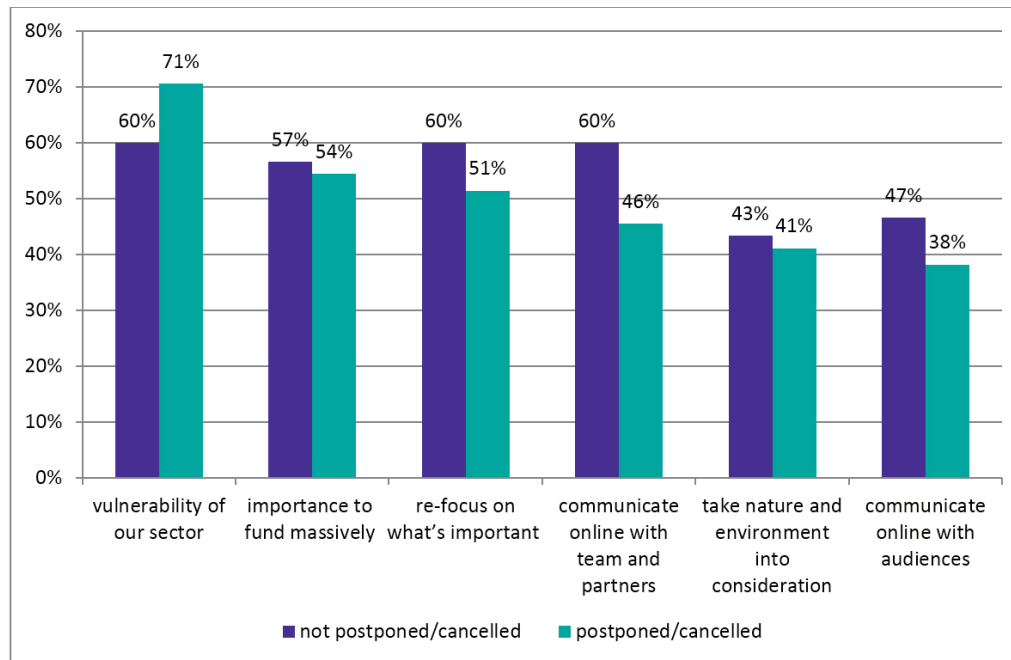
**Graph 11**



The following table shows that festivals that were cancelled or postponed, gave expression to their feeling of vulnerability at a higher rate (in 71%) than the rest.

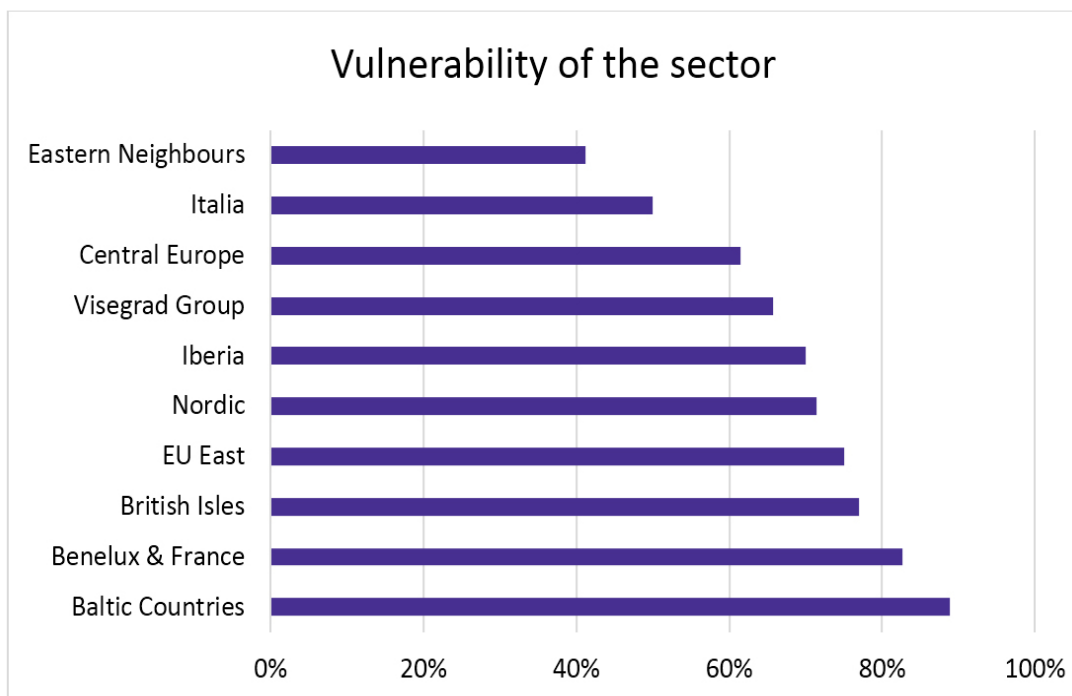
At a time when the public seeks information about the festivals primarily in the virtual space, the lowest share of the communication with the audience is a bit surprising – although festivals still exempt from postponement or cancellation showed a higher degree of affinity (47% vs 38%).

**Graph 12**



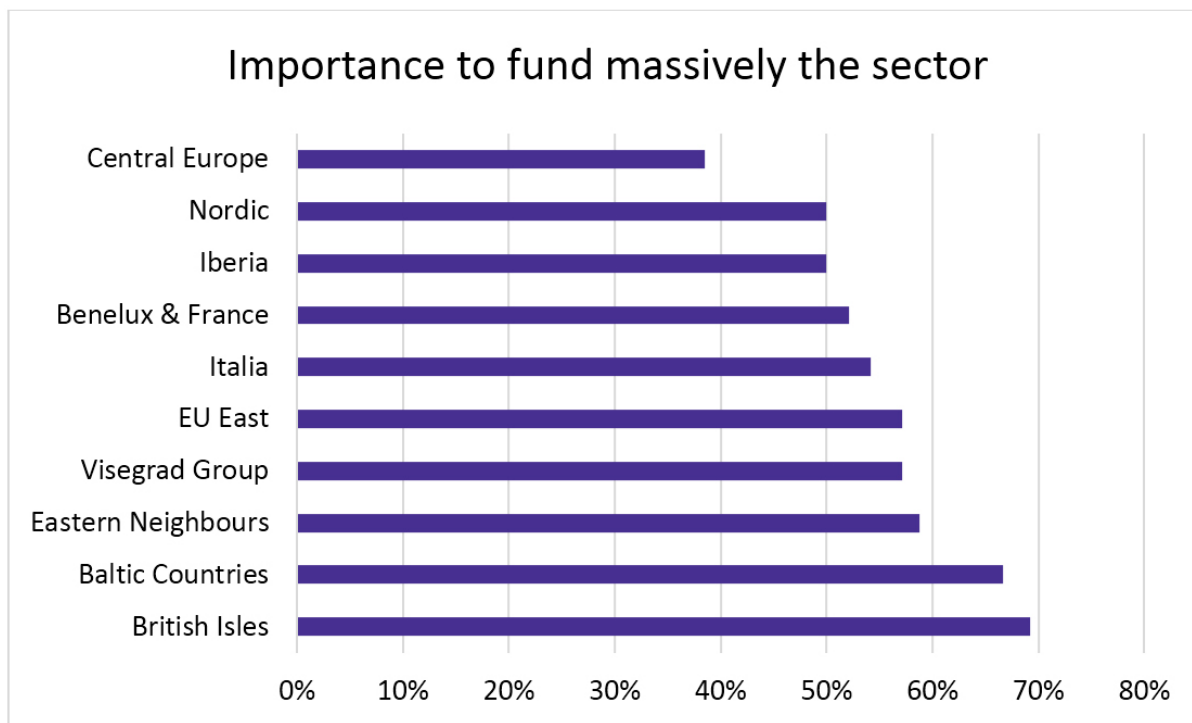
Interesting is to see how the statement about the vulnerability of festivals was chosen by participants from the various regions: festivals from the Baltic region voted for it in greatest number while festivals in the Eastern Partnership countries found it the least important issue:

**Graph 13**



The second most popular choice for a lasting lesson was the importance of massive funding of festivals. Respondents from the UK and Ireland voted for this in the greatest numbers, while only 38% of German, Austrian and Swiss festivals did so.

**Graph 14**



Matching the responses about the lessons of the pandemic to the size of festivals expressed by the number of staff members the survey produced one case that diverged from the rest: 90% of festival organisers with a larger staff than 20 opted for “learned the vulnerability of our sector”. Smaller festivals thought so in 75% only.

## 10. Positive legacies

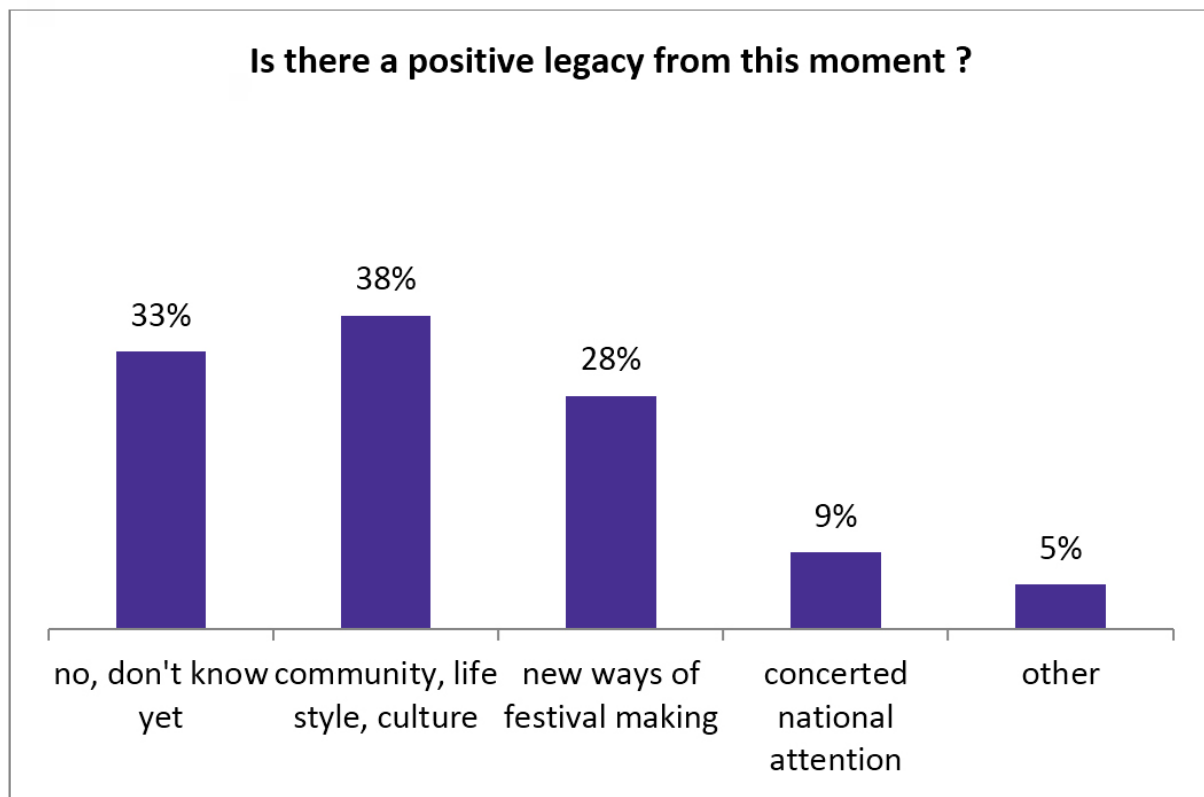
The survey inquired about eventual positive legacies of the emergency situation. As this was an open question, a great variety of answers were given, grouped according to the following:

- 38% of the responses prospected growing attention towards the sense of community, an inclination to change life styles and an increased appreciation of the role of

culture.

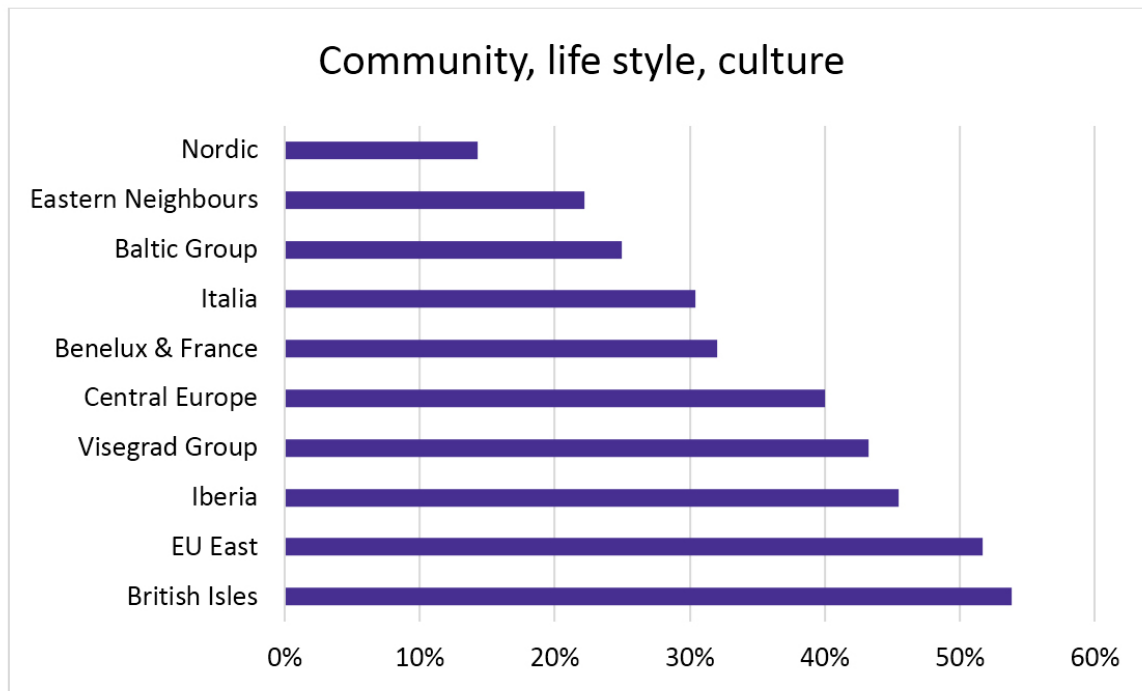
- Although the above shifts in attention are also supposed to take place in the context of festivals, 28% of the answers focused specifically on seeking new ways of festival making.
- 9% believed that festivals would receive greater attention and more coordinated help on the national level.
- And 33% doubted about any positive legacy.

### Graph 15



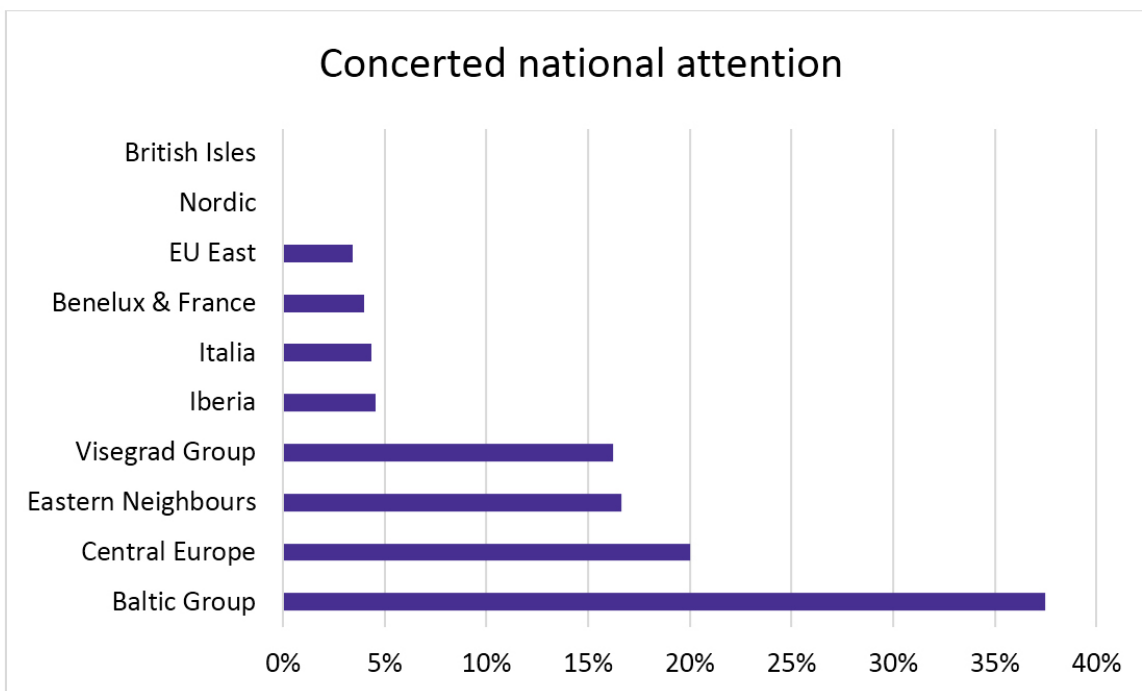
In this connection, British and Irish respondents proved to be the most idealistic or ideological in their trust in the prevalence of more spiritual values. Nordic festival organisers, on the other hand, were sceptical about both this option and the one that follows below.

**Graph 16**



Responses coming from the Baltic republics put their faith in increased collaboration on the national level, which received 0% attention from British Isles and the Nordic group.

**Graph 17**



In addition to the responses given to the question about the legacies of the unusual circumstances, sparks of optimism popped up in various parts of the survey:

*"Generally the reaction of our artists and public has been excellent." (FR)*

*"The festival will carry on, in any surviving size whatever happens." (TR)*

*"We always have the Plan B." (AM)*

*"We're looking into investing more this year into residences and co-production to help the artistic companies as much as we can." (SI)*

*"Festivals and cultural operators will stand at the forefront of overcoming the fears and reinstating belief in the need for real-life human interaction and international exchange - that's what culture is all about!" (EE)*

## 11. Conclusions

The main message of the survey is the vulnerability of the European festival scene. Many of the respondents to the questionnaire expressed the concern about the precarious position of the entire cultural sector. The survey revealed, however, that festivals are particularly exposed to unforeseen turmoils – even to smaller turbulences than the current pandemic – due to their lower degree of institutionalization than the greater part of the cultural sector. This has historical and structural explanations.

Historically, the changes and developments in Europeans' way of life have increasingly favoured the interactions with culture in the frame of festivals. Citizens' leisure conditions and habits, economic circumstances and value preferences have all contributed to the ceaseless growth of the numbers and the attendance of festivals. This progression has occurred both in quantity and quality. Festivals broaden the opportunities to meet with the arts and involve people in much greater numbers and composition than what the conventional cultural institutions – concert halls and theatres – could achieve. Also, festivals offer experiences of togetherness, are community events to a greater degree than what most instances of culture could traditionally offer.

Structurally, with very few exceptions, festivals have light organisational backgrounds. A huge part of the festivals that responded to the survey are run by very small staffs. Compared to established cultural institutions, even to continuously active independent art groups, the organisers behind most festivals reflect an ephemeral character. Blows smaller than the Covid pandemic – e.g. shifts in state or municipal policy priorities or in sponsors' conditions – can extinguish festivals, despite years of record of positive reception and impact on the community. This fate equally threatens festivals run by non-profit organisations or entrepreneurs.

The massive presence of festivals in Europeans' lives can be measured by the time – frequency of opportunities and lengths – that citizens of all ages spend on festivals. Even more decisive is the role of festivals in the income and careers of performing artists (and a growing number in the visual arts, too).

The sad irony is that the increase of festivals' importance in today's cultural life, which happens before our eyes, has not found reflection in cultural policies. Festivals rarely get sufficient attention in cultural strategies and often are altogether missing. This is happening also with regard to the responses that authorities at various levels are giving to the damage that the Covid pandemic has inflicted on culture. Fortunately, in many places the losses that artists have been suffering – not the least due to the cancelling of festivals – have been recognised and public compensation is targeted toward the artists. Yet the survey proves that the importance of festivals (with their organisational professionalism), as a vital guarantee for the sustainable operation of performing artists and their ensembles, has almost nowhere been explicitly acknowledged.

**The shaken position of tens of thousands of art festival across Europe – communicated through the respondents to the EFA survey – calls for a robust position of festivals in the thinking of decision makers and in the priorities of cultural policies.**



## 12. Recommendations

The survey has corroborated that:

- art festivals fulfil an increasingly vital role of in the life of European citizens' lives, by enhancing well-being, social cohesion and other values of community;
- festivals have grown into eminent fields where the products and actors of various fields of art meet their audience;
- the Covid pandemic situation gave rise to a huge variety of digital manifestations of culture, also in the festival scene: yet at the same time it pointed out the irreplaceable significance of shared physical encounters with culture, an eminent feature of festivals;
- festivals normally generate additional spending: its absence due to the closure of the events underlined the importance of the economic impact of festivals in the life of many communities.

**The vital role of festivals must therefore be better acknowledged in the agendas of cultural policies at local, national levels and that of the European Union.**

**Increased attention must be paid to the multiple functions of festivals in a number of other fields of public domain, including tourism, urban and regional policies, social and youth policies, external action and so on.**

The survey has identified a large gap between the damages caused by the pandemic to festivals and the assistance they have received.

**Festivals and their organisers should receive greater attention and more help when the losses inflicted by the Covid pandemic are compensated from public sources.**

Due to their versatile and flexible nature – which should remain a natural feature even when their role is better acknowledged –, festivals are exposed to unforeseen harmful effects, which threatens them more than the better established institutions of the cultural sector.

**Societies therefore should conceive measures that can provide protection against excessive losses. These can include preferential insurance schemes and special emergency funds, targeted legal instruments to facilitate safer relationships etc.**

The responses confirmed a wide variety the mechanisms of fiscal incentives to culture across countries in Europe, but also their weak and marginal impact. These measures include incentives to charity, tax exemptions, better regulations of sponsorship etc.

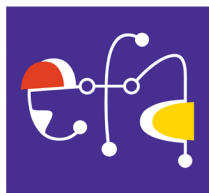
**In the shared interest of the thriving of European culture the best practices in fiscal incentives to culture in general and festivals in particular should be exposed and adopted between countries.**

We keep in mind that culture is national competence; nevertheless, the flowering of culture in Europe is a shared cause. The survey proved that festival organisers across Europe expect the European Commission to seek common solutions to the vulnerability of festivals so cruelly manifested during the Covid 19 pandemic.

**The European Commission should play a catalytic role in enhancing the proper acknowledgement of the role of festivals in societies today, and in facilitating the exchange the best practices in addressing the vulnerability of art festivals.**

## 13. Annex

Armenia	1	Baltic Countries	9
Austria	1	Benelux & France	25
Belgium	11	British Isles	13
Bulgaria	6	Canada	1
Canada	1	Central Europe	15
Croatia	6	Eastern Neighbours	18
Cyprus	2	EU East	29
Czechia	14	Iberia	22
Denmark	5	Italy	24
Estonia	2	Nordic	14
Finland	6	Visegrad Group	38
France	4	<b>Total 208</b>	
Georgia	2		
Germany	11		
Greece	6		
Hungary	14		
Ireland	4		
Israel	1		
Italy	24		
Kosovo	1		
Lebanon	1		
Lithuania	7		
Malta	3		
Montenegro	3		
Netherlands	10		
Poland	8		
Portugal	11		
Romania	4		
Serbia	2		
Slovakia	2		
Slovenia	2		
Spain	11		
Sweden	3		
Switzerland	3		
Turkey	2		
Ukraine	5		
United Kingdom	9		
<b>Total 208</b>			



## EUROPEAN FESTIVALS ASSOCIATION

Saintelettesquare 17  
1000 Brussels - Belgium  
T: +32 2 644 48 00

[www.efa-aef.eu](http://www.efa-aef.eu)  
[info@efa-aef.eu](mailto:info@efa-aef.eu)



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