



Creative Sector FORECAST REPORT



2020

Executive Summary

Before Covid-19 struck, the term 'disruption' had been in vogue in many circles, including the entertainment scene. But most of us were using it in round table discussions and workshops as we mulled over what the future held. Paradoxically, the pandemic decided to bring the future to us, and we could no longer mull over these disruptions, but delve in full throttle and embrace the new normal. Granted, Covid-19 is a devastating catastrophe that will be remembered in history as the monster that separated families, claimed hundreds of thousands of lives, and stole the dreams and aspirations of millions of people whose careers and livelihoods came to an abrupt end.

Covid-19's incongruous nature also demands that we acknowledge its expository function in this tragic tale, where despite the despair and hopelessness it has brought forth, it has also opened our eyes to unlimited possibilities if we fully embrace the digital transformation, including in the creative arts sector.

With "Work from Home" being the norm during this period, artistes have had to go back to the drawing board and recalibrate their thinking and approach, and this has led to unprecedented experiments in Kenya's creative sector, in line with global trends. We have experienced art in various forms being consumed on digital platforms. Film premieres moved to Video on Demand platforms, music concerts and shows became mainstays on YouTube, theatre shows had to follow the bandwagon, and an application (theatre.co.ke) was launched by the Kenya Cultural Centre for theatre consumption. National and international festivals moved to the digital space and surprisingly garnered larger followings and participation due to the dissipation of geographical boundaries. The better part of this year has seen all artistes make efforts to embrace the digital space in their quest to be relevant and compliant in the fourth industrial revolution.

We interviewed a few practitioners, scholars and policy makers to find out how they have been coping, what they are currently doing, and to tease out their thoughts on how the creative sector playing field will look once we resume normalcy. This is because we believe artistes need to put elaborate strategies in place in order to thrive once normal operations resume. Covid-19 might be with us for a while, and we also need to share ideas on who is doing what and how its working for them. Covid-19 is a living nightmare. It's also an opportunity to come together and embrace digital technologies to take our crafts to the next level.



Ngobia B. Benson

(Chair, Department of Performing Arts, Film, Media and Economic Studies, KCAU)

Introduction

Social gatherings sustain the performing arts. The government's ban on public events following confirmation of the first Covid-19 case in Kenya more than three months ago has put a strain on artists' livelihoods. The entertainment sector in Kenya and across the world has experienced a huge blow with artists being compelled to re-strategize to weather the storm. Kenya's art scene has taken a hit with emerging artists suffering more than established performance artists, some of who have had the wherewithal to give live shows online.

To cushion the artists financially, the government announced a stimulus package. A very timely move. It is a source of hope and gives faith to the artist – especially in these incredibly uncertain times. But as Mwongela Kamencu - a Kenyan recording and performing artist questions, did the directions and conditions given on how an artist could successfully access the stimulus package lead to stifling of talents, time, artistic freedom of expression and rights to the work? There definitely needed to be more thought, better structures in creating far more financially secure production outfits that can withstand economic downturns and revenue-impacting crises affecting performing artists.

The education sector has not been spared either. With the need for social distancing, most institutions offering performing arts courses at tertiary and university level have shut down and opted for remote engagement. Though this aids in coping with the new normal, it raises questions on the quality of learning as the units taught are practical based and require the facilitator to monitor the student's progress on one on one basis owing to the fact that these students have different learning abilities. This platform also limits students who are not able to access the internet or purchase required gadgets. To counter this, institutions need to rethink their teaching approaches as they are critical players as a source of intellectual resource and general support for the creative sector.

The creation and showcase of productions has also been slowed down by the need for social distance. This makes it difficult for performing artists to work given that the process necessitates having several members of cast and crew in a theatre. Before Covid-19, strangers would queue in curving lines to buy tickets for shows, then commune in a dark room to watch a theatrical performance. Now, the theatre finds itself emptier than it has ever been, its future left to speculation. With loss from sales, delayed workshops, festivals and cancelled or postponed show openings, there is a shift in the professional landscape for most artists. Kenya National Theatre should borrow a leaf from the National Theatre of United Kingdom in taking advantage of the digital space to showcase recorded productions.



Sarah Akinyi Masese

(Tutorial Fellow, Performing Arts, KCA University)

Introduction

The Covid-19 pandemic has had a substantial impact on the television industry, mirroring its impacts across all arts sectors, shutting down or delaying production of television programs in many countries with consequent negative impact on revenues, mostly through rights and advertising sales, and employment.

Worst hit by the pandemic are scripted television programs. Ampere Analysis projected that the pandemic had delayed at least 60% of scripted television programming worldwide, including at least half of the programming originally scheduled to air in the second half of 2020. This has seen an increase in non-scripted productions, including smaller-scale series capable of being produced remotely. Program managers are using such programs to fill schedules until scripted programs resume production. Audiences however are becoming tired of the pandemic-themed programming and endless repeats of popular shows.

It is against this background that new Covid-19 production protocols are being developed and published around the world, with each set of guidelines pored over by the industry to see when and how production might be able to restart. Some of the safety protocols being recommended by film, TV and commercials organizations the world over as the industry gears up to restart production include separating crew into cohorts; Encouraging talent to dress themselves; Face coverings on set; Regular testing of crew; Avoiding public transport; Appointing a Covid-19 health and safety officer.

As the world prepares to resume production under new health and preventive guidelines, Kenya might struggle to get out of the current situation. Countries that have vibrant arts and culture industries have the industry players organized into associations and guilds that help improve standards, harmonize compensation for artistes, and serve as platforms for learning. They can also engage the government or other sectors with a united front so as to pile consistent pressure to have their concerns and needs addressed. The current state of associations in Kenya is that they are fragmented, disunited and lack a common consistent agenda of how to engage the government and different industries to ensure that the standards in the industry consistently improve as do the lifestyles of artists in the sector.

A report published by HEVA Fund (2020) reveal that over 60% of artists are not affiliated to any professional organization relevant to their work, and only 20% are registered by government agencies. As stakeholders in television drama production work out modalities to resume shoots, the issue of associations and affiliations should be addressed. This is the only way to form a united force to withstand and face challenges posed to the industry going forward.



Leonard Lusaac Wanyama

(Tutorial Fellow, Journalism, KCA University)



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**Creative Sector
Forecast Report 2020
(In their own words)**



The question we need to ask ourselves first is when will the situation normalize and life gets back to normal? The truth is, this won't happen instantly. But even if it ended and normalcy resumed, there will still be a lot of skepticism among Kenyans about gatherings.

The creative sector thrives on gatherings. So when there are no gatherings or when people are skeptical about gatherings, the sector continues to suffer. This means that when the situation is declared normal, it will take some time for the industry to resume normalcy. We will still continue experiencing empty theatres and cinemas for sometimes.

Secondly, since the economy is heavily affected, with salary cuts and job losses, very few Kenyans will be spending on entertainment. Majority will be struggling with subsistence and will not get money to spend on entertainment. This further complicates the income flow in the sector.

As Kenya Cultural Centre, we are working on strategies that would make the sector remain afloat taking into cognizance the effects of the pandemic on the sector. We have started forming partnerships with other institutions to bring in various expertise that would help us achieve our mandate and help in talent development in the country. We are working on programs that would be consumed virtually and also develop a platform where artists can still produce their works of art and earn from them when their audiences watch or interact with the works. We are continuing to provide the space for artists to produce works of art while observing the Ministry of Health guidelines.

Michael Pundo
(Ag. C.E.O, Kenya Cultural Centre)



During the pandemic, the most sought after item outside consumer goods like food and beverages has been physical and social engagement, due to the stay at home routine. The consumption of video content has seen a remarkable rise during the pandemic. Subscription for video on demand platforms has grown significantly. For as long as we have the pandemic, people will crave content to consume. News content for information and entertainment content for leisure.

The biggest concern right now is we don't have enough quality content, which is a global concern. You take months or years to create a series and a binge watcher consumes it in one week and demands for more content, and so repeats become the order of the day. Demand is high, supply is low. We need to produce more qualified artistes to generate more content for entertainment and enrichment purposes.



Covid-19 has given an opportunity for artists to fill the content gap by exposing just how little content we have against the demand from the consumers. We also need to teach artists how to convert their art into livelihoods and businesses. MultiChoice will be focusing on production of local content of high quality. MultiChoice seeks to offer entertainment content for all classes: lower class, middle class and the high class, through platforms like Showmax and Maisha Magic.

Nancy Matimu

(Managing Director, Multichoice Kenya)



Based on sub- sectoral risk and impact, HEVA forecasts increased online service provision, wider reskilling, and accelerated supply chain solutions. Stimulus financing can protect revenues and cash flow, stabilise operations, and plan for new models and markets. We've committed KES 100 million in debt financing for sector resilience and transformation in Kenya and the region. We released a report, which is on our website, detailing Covid-19's sector effects, and a comprehensive strategy for sector evolution in Kenya, based on our industry experience and practitioner realities on the ground.

We are also working with stakeholders in Tanzania, Uganda, Ethiopia and Rwanda to compile and share individual country plans, thus generating an intentional Eastern African strategy for the mountainous tasks ahead of us all.

Dr. Njoki Ngumi

(Programs and Strategy Manager, HEVA Fund)



The effects of Covid-19 in the film industry can already be felt. Filmmakers have less work as both commercial and independent productions been forced by Covid-19 to either cancel productions or employ smaller crews.

Production funds have, despite increased consumption of content, been challenging to secure as a slow -down in the economy has had repercussions on both commercial and NGO funding. In addition to a reduction in the number of productions, live screenings in cinemas and in pop up locations have suffered. Filmmakers and production houses both locally and globally must rethink their distribution plans and re-imagine what a successful online outlet for content would look like to survive.

Docubox has fortunately been able to pivot from hosting mainly live events (masterclasses, screenings, and more) to online ones and are now committing resources to establishing an online platform that will live on beyond the pandemic.

Judy Kibinge

(Founder and Executive Director, Docubox)



Whilst the culture and creative sectors were able to move some content online with the increased demand for streaming, this is not sustainable over the long term and the benefits are accrued by a few large tech companies. Sustained and responsive public support and recovery strategies are necessary to create long term solutions to grow the supply and demand for cultural goods and services to revitalize the sector.

As the country opens, the Alliance Française de Nairobi will continue to support artists and facilitate live performances, exhibitions, and other cultural activities to boost recovery and ensure artists' livelihoods.

Harsita Waters

(Head of Cultural Affairs, Alliance Française)



Adaptation of how content is disseminated is going to be greatly impacted especially given that cinemas are shut for the foreseeable future and public gatherings are limited. This will lead to a further rise in online usage, especially given the Kenyan government's efforts to further enhance connectivity in marginalized communities through programmes such as the Google Balloon project and cheaper connectivity costs coming into play across the country.

There will be an increase in online streaming platforms for entertainment, educational and training purposes, repositioning the way in which the film and photography industry will receive training and skills but also the way in which entertainment is consumed.

Canon Central and North Africa will continue to support the development and strengthen the local film and photography industry in Kenya through the Miraisha programmes by providing training, skills development and associated industry content to the youth and the next generation of practitioners through virtual workshops incorporating a practical element. Using a virtual method will ensure capacity building can reach even further remote communities and more so connect practitioners together across the field to collaborate and unite to strengthen the industry.

Katie Simmonds

(Business Development Manager, Canon Miraisha)



The COVID-19 pandemic had a sudden impact on arts' training; an effect that inexorably calls for a different approach in the teaching of the arts. I foresee institutions teaching the arts espouse a blended learning mode that will entail online as well as face-to-face teaching as opposed to the traditional approach of only face-to-face teaching subsequent to the practical nature of arts-based courses. Kenyatta University is currently working on producing training modules that will enable effective, standard content delivery through a combined approach – teaching of theoretical (and some applied) aspects totally online and real hands-on / practical components face-to-face.

Prof. John Mugubi, PhD

(Dean, School of Creative and Performing Arts,
Film and Media Studies, Kenyatta University)



At KCAU, the smart phone has become a pivotal resource with students encouraged to use it for screenwriting, cinematography, sound recording, basic lighting and editing, and despite a few hiccups at the initial stages, students embraced the new normal and got to learn of the infinite resources a smart phone has, and have impressive original short films shot within their localities to show for it. We however plan to conduct masterclasses as make up classes once physical learning resumes.

Through the Film Lecturers and Trainers Association of Kenya (FLeTA-K) we have also partnered with Canon to offer virtual classes in collaboration with film institutes in Ghana and Nigeria, where students do joint productions across the continent in a bid to expose them to online learning in different countries and compare notes. FLeTA-K plans to build up on this once normalcy resumes to continue encouraging students to tell African stories and collaborate more across the continent, and for lecturers to share ideas and best practices.

Ngobia B. Benson

(Lecturer, KCAU and Secretary-General, FLeTA-Kenya)



Post Covid-19, there really should be more attention given to the arts education sub-sector. Music, theatre and movies (online) have played an important role during this period.

Sadly, this will not be remembered and the arts, if taught at all, will be relegated to secondary subjects as usual.

Ian Mbugua

(Actor/Trainer)



The new normal for the film training sector will be the adoption of online learning. Kenya Film School's new online workshops will support the college's "hands-on" approach to learning, while students continue to draw on the knowledge from industry professionals, virtually.

We feel that the launch of the online courses is especially timely when many aspiring youth interested in studying at Kenya Film School must stay home to remain safe and healthy. As more youth are finding themselves housebound, this is their opportunity to explore an art form they've always had a passion for.

Each workshop includes live instruction, group meetings, and additional one-on-one consultations with instructors. In keeping with our KFS mission for on-campus instruction, class sizes are kept small to allow for optimal teacher-student interaction, discussion, and critiques. Throughout the workshops, students will learn by doing as they complete their projects offline.

Victoria Goro

(Director, Kenya Film School)



Covid-19 has really hit the creative sector in Kenya hard, and theatre especially, being an art that is dependent on human contact, interaction and presence of a live audience. For theatre to thrive in this difficult period, producers and companies have to be very creative and embrace the digital space while still ensuring that we do not compromise the basic features that define theatre.

Theatre companies and producers have to table proposals to professional spaces to allow them to stage and record productions and start selling them on digital platforms.

As a key stakeholder in the sector, we have developed an exclusive digital platform, theatre.co.ke, a web and mobile application that will be able to host, live stream and sell theatre productions and is open to all theatre artists. I believe that this is great help to theatre artists and will help them reach a wider audience in Kenya and beyond.



2020 is a special year for Kenya International Theatre Festival as it is the year we mark five years of existence. We will thus host an online festival for 5 days, with participants drawn from 5 continents and 5 counties from Kenya, 5 hours a day.

Kevin Kimani Kahuro

(Founder/Festival Director, KITFEST)



Drama will live beyond Covid-19. The new normal means rewriting the rules so that the Ministry of Health protocols are met. Kenya National Drama Film Festival (KNDFF) has organised a workshop to establish new rules to govern our operations beyond 2020. These changes will have far reaching implications on how the various genres in the festival will hence be performed. I foresee smaller casts and film catching up with stage plays in KNDFF.

James Indimuli

(Executive Secretary, KNDFF)



I believe most Festivals will have both physical and virtual events. This will increase participation, reach and impact of Festivals to many more stakeholders who are not able to attend festivals for one reason or the other.

The Lake International PanAfrican Film Festival (LIPFF) 2020 edition was virtually streamed on our YouTube and Facebook pages, with the Gala Awards Ceremony physically attended and streamed online so that those who weren't able to travel were able to attend virtually.

Dr. Zippora Okoth

(Festival Director, LIPFF)



Because film is a fledgling industry, many operations have been barely making it month to month.

Covid-19 regulations, restricting close contact and working environment has meant that many film companies have either closed or gone dormant. For many in the film sector, reopening is going to mean starting all over again. Months and years of hard work have been washed away in the last few months.

The only future for the industry would be for the government to utilize this shutdown time and craft a springboard initiative in collaboration with the media houses and advertising agencies. This would salvage the local industry. A similar initiative involving the Kenya Tourism Board and the Ministry of Tourism would do the same for foreign films.

Another negative impact would be that trained and experienced crew, a valuable and rare resource of our industry, having failed to earn a living in the industry, may opt to get employed elsewhere. That would be a great loss.

Without the above initiatives, we are looking at a bleak future indeed.

Jim Shamoon
(Blue Sky Films)



I think the sector is going to contract because:

1. Productions have to observe Covid-19 safety precautions. This means money.
2. Audiences will shy away from screenings due to social distancing rules.
3. Most supported content is expected to be Covid-19 related which might put off some audiences.

Cajetan Boy
(Writer/Creative)



Covid- 19 pandemic has been in Kenya since mid- March. We have many production houses that deal in film and we have all been affected since shooting requires various departments to work closely together, physically. I've had to do makeup, hair, costume, lighting, catering, blocking scenes, continuity etc.

Since the rule is to keep a 2-metre distance for everyone's safety, film has been hard hit with most production houses closing down waiting for the pandemic to pass if at all.

We at Kaaya films are currently in script development and so it has not been so hard hitting as we can still run workshops keeping a safe distance.

However, the Kenyan government has reached out and supported many filmmakers who applied for grants for both short films and features thus boosting our morale.

Sippy Chadha
(Writer and Film Director)



As has already been witnessed, we are seeing the cutting of budgets for shows which results in even less pay for actors. Which means even greater economic hardships for actors. The theatre scene is even harder hit. Even when shows open, fewer audiences will have the disposable income to consume theatre.

On the positive side we are seeing the resilience of creatives in finding new avenues to share their art (especially online) and ingenious ways of creating art that is consumable without direct contact with the audience. I see this continuing to flourish and hopefully creating a more diverse arts scene in the country where the gatekeepers (TV stations and theaters) have less dictatorship of the art being consumed.

As MKM, my contribution is to continue to help actors sharpen and explore their skill sets and to give them encouragement to create their art beyond the traditional avenues already established in the country. I am excited to see what creatives create in these uncertain times, and to see the long lasting narrative they create to help future generations understand and experience this hopefully once in a lifetime experience.

Melissa Kiplagat
(Actor and Acting Coach)



Many, if not all, productions have had to go on a production break, or taken extraordinary measures to reduce numbers. The ripple effect might be less productions will be available for broadcasting on TV.

The audience, I would imagine, will want to find alternative sources of entertainment, and that is where the internet and social media will come in to fill in the gaps. This has been a slow process, the transition into social media optimization by content creators, but since the first case, where TV has mostly been reporting news and updates on Covid-19, audiences have moved to the internet for their entertainment. TV is slowly then becoming less reliable as a source of entertainment for the audience, and we must follow the audience where it is.

The revenue streams have lessened or the amounts reduced in size, but the work still goes on. At this point, I believe for purposes of income generation, a stronger grip on social media is necessary as opposed to television, with TV stations also currently reducing the budgets they would spend on TV shows. This then means that the main income will come from social media and subsidies from TV, with social media handling expenses, and TV giving a bit of profits.

Martin Githinji

(Actor and Content Creator)



The temporary lockdown of the economic and social life has cut down sharply on social contacts yet the lockdown is very costly and inefficient, and it may take many months to recuperate the habit to attend theaters again. The realization of the UNESCO tools should augment campaigns in advocacy and the need to approach policy makers on the short term impacts of Covid - 19 on the sustainable development goals.

At the Nakuru Players Theatre, the artists need to be motivated to participate civically with actions that will influence real change. The decline in public trust of institutions and the public sector further reinforcing the feedback loop of disengagement. Our artists have to rejuvenate the people's sense of urgency which is on the decline especially given negative or incomplete experiences of government in their lives.

Barbushe Maina

(Vice Chair, Nakuru Players' Society)



At the moment, most animators are right at home because most of them spend endless hours working behind their computer screens and so this season is just another day in the life of an animator.

The following are things I foresee: an undeniable presence of the sub-sector because during the pandemic many people and businesses have sought animation services in the form of advertisements, entertainment and teaching/education aids, more people outside the field of animation will understand how animation is created and will appreciate the cost that goes into animation, higher quality productions due to animators learning from their colleagues from all over the world on how to better their craft and capture the target audience, increased job opportunities for Kenyan animators to export their work in animated productions around the world now that physical distance will no longer be a barrier due to technology, and an increase in persons wishing to take up animation training.

Dennis Mbutia

(Game Designer and Animator)



Post Covid-19, the art sector in the Coast may experience a lull in productions because of financial constraints. Many creatives are out of jobs now; therefore they may lack funds to put up a show on stage or production for screen afterwards. The stage audience too may not have the money to watch a stage show; such will be considered an unnecessary expenditure.

If all goes well, Filamu Forum, which I founded and chair, will work with a financial entity to see how to boost a few creatives so that they can shoot pilots or movies.

Cliff B. Okumu

(Writer and Director)



The theatre sub-sector in Embu will take time before it resumes normalcy. This is because of the fear attributed by Covid-19 in regard to public gatherings. The production companies may be required to innovate new ways of reaching their audiences. Plans to mitigate the impact include leveraging on social media to showcase productions.

Pithon Muchoki

(Director, Vijana Uongozini)



I foresee the performing arts sub-sector going back to normal at last. Until then, we will have to be creative and look for other platforms in order to not only stay relevant, but also to be able to keep earning an income. Other platforms can be virtual and this is already happening and Sarakasi will also plug into that. We are also researching other options like international contracts in countries that already have opened up and we are happy to send one group to Italy soon.

In addition, we have successfully been able to secure other work for groups of our artists in Covid-19 intervention activities and private performing arts classes. We have also partnered with organizations and clients who have donated food items to our artists.

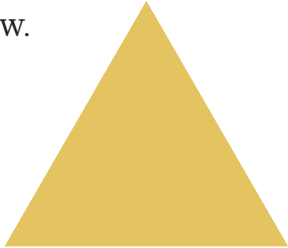
As an organization, Sarakasi always had other sources of income, and these have helped us to keep ourselves afloat. For the future, whatever it brings, we have to be ready to refocus and thus stay one step ahead of the new trends that are surfacing in terms of online platforms, job opportunities as well as possible funding opportunities in the form of grants.

Marion Op het Veld
(Managing Director, Sarakasi Trust)



Recommendations

It is clear from the insights acquired that a recovery plan is needed to shield the arts sector from the impact of the pandemic. This plan should not be left to chance but rather it should be a consultative effort that brings together government and policy makers, funding institutions, venues and presentation partners, production houses, and artistes in their various capacities. There is a sense that the creative sector had been in survival mode even before the pandemic, yet the sector still exhibits a high sense of resilience. It's however time for the sector to stop surviving and start thriving. Post-Covid, the sector stakeholders should avoid a 'return to normalcy' where normal means status quo and aim for accelerated growth in all the sub-sectors. Here are a few recommendations to the sector stakeholders derived from this report:

1. Government support through its various agencies needs to be intentional now more than ever, with grass roots artistes especially needing support in embracing relevant software and hardware so as not be left behind.
 2. The time is ripe for a well-structured arts endowment fund. The stimulus package was a welcome move, but let's have a long term solution. Stakeholders should put their heads together and actualize this.
 3. Performance and exhibition spaces and cinema halls should consider reducing their space hiring fees as most artistes will find it hard filling spaces due to social distancing measures.
 4. A hybrid combination of virtual and in-person attendance at festivals should be encouraged for more participation.
 5. Investment in tech gadgets is no longer an option for artistes. At the very least, smartphones should be must-haves.
 6. Artistes have to embrace digital media for progress, and need to be empowered on how to create revenue on these platforms.
 7. We have seen a flurry of webinars and masterclasses on online platforms, offered by experts, organizations and institutions, and most are free of charge, so artistes should grab the opportunity to add some little knowledge to their craft.
 8. Collaboration is the way to go. We can now work together more since geographical boundaries are no longer obstacles.
 9. Artistes need to keep creating. Content demand is high while supply is still low.
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About the Author

Ngobia B. Benson currently chairs the Department of Performing Arts, Film, Media and Economic Studies at KCA University. He is a seasoned creative with special focus on film development programmes in learning institutions, and has worked with tens of schools over the last 13 years to develop film and theatre programmes to complement basic education in the Kenyan education system. He is also involved in the development of the film curriculum at the Technical and Vocational Education Training (TVET) level and the performing arts syllabus in the Competence Based Curriculum (CBC). He holds a BA in Theatre Arts and Film Technology from Kenyatta University and is an MA(C) in Digital Communication at the United States International University - Africa. His research interests lie in new media, digital media and the convergence of artistic forms on these platforms.



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