



Pandemic Preparedness in the Live Performing Arts:

Lessons to Learn from COVID-19 in the G7 Countries

Project Report

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Project aim, methods and objectives

This report is complementary to the Summary Report of *Pandemic Preparedness in the Live Performing Arts: Lessons to Learn from COVID-19* published by the British Academy in March 2024 <https://www.thebritishacademy.ac.uk/projects/pandemic-preparedness-in-the-live-performing-arts-lessons-to-learn-from-covid-19/>. These examine the lessons learned from the responses of the live performing arts sector and governments to COVID-19 in each of the G7 countries. Our aim is to offer understanding that can be used to improve sector resilience to future crises, whether caused by new pandemics, climate-related disasters, demographic changes, economic pressures or national and international politics.

Part 1 of this document consists of the reports compiled by research teams in the UK, Canada, USA and Germany. These teams carried out extensive syntheses of literature produced between 2020 and 2023 on the impacts of the COVID-19 pandemic and governmental and sector interventions for the live performing arts (mainly theatre, but also opera and dance). They reviewed the full text of 356 sources, of which the vast majority were focused on theatre. Our core searches of SCOPUS and Web of Science, Google Scholar and key journals found limited amounts of academic, peer-reviewed literature produced before October 2023, especially in the USA, Canada and Japan. We therefore expanded our scope to include government-sponsored research, policy papers by sector organisations and advocacy groups, specialist journalism, trade press, and blogs.

The crisis context in which much of the literature was produced led to the production of studies of variable quality and scope. Therefore, each team additionally carried out stakeholder interviews in their own countries. These were complemented with discussions with our Lived Experience Panel representing diverse sector practitioners in the UK, USA, Canada and Germany. Our aim has been to provide an up-to-date comprehensive perspective that remains cautious about potential biases.

Early stakeholder interviews carried out between April and August 2023 helped shape our focus, drawing our attention to overall policy responses, workforces, organisations and their audiences, creative outputs and the value of culture, as well as overarching systemic and structural concerns. Further conversations with stakeholders and academic partners between September 2023 and February 2024 were instrumental in calibrating the literature reviews and supporting the iterative shaping of policy recommendations.

Part 2 of this document consists of the reports compiled by our research associates in France, Italy and Japan, who carried out additional non-systematic literature reviews for these countries.

Key comparative findings across the G7 can be found in the Summary Report, available via <https://www.thebritishacademy.ac.uk/projects/pandemic-preparedness-in-the-live-performing-arts-lessons-to-learn-from-covid-19/>. There you will also find evidence-based recommendations for UK policymakers designed to support sector resilience to future severe disruptions caused by crises of public health, climate or other factors.

Pascale Aebischer and Karen Gray

Project Funder Statement

The British Academy:

The British Academy is the UK's national academy for the humanities and social sciences. We mobilise these disciplines to understand the world and shape a brighter future. From artificial intelligence to climate change, from building prosperity to improving well-being – today's complex challenges can only be resolved by deepening our insight into people, cultures and societies. We invest in researchers and projects across the UK and overseas, engage the public with fresh thinking and debates, and bring together scholars, government, business and civil society to influence policy for the benefit of everyone. The Academy, alongside the other national academies, is a distinctive element in the research funding ecosystem and complementary to UKRI, offering responsive, bottom-up grants at key career stages, from early career to senior fellowships. The Academy receives public funding from the Science and Research budget allocated by a grant from the Department for Business, Energy and Industrial Strategy (BEIS). It also receives support from private sources and draws on its own funds.

The Pandemic Preparedness programme:

COVID-19 is the most challenging health crisis we have faced for decades. The impacts of the pandemic are changing lives and livelihoods, cultures, communities, societies and economies. Evidence from the social sciences and humanities is critical to ensuring that our preparedness for future pandemics is placed on the strongest possible footing, however, with attention starting to move elsewhere it is essential that the lessons learnt from COVID-19 are not lost.

This programme aims to identify lessons learned and lessons to learn from the experience within G7 countries of preparing for, adapting and responding to COVID-19 for future pandemic preparedness. Seven projects have been funded through this programme drawing on experience across G7 countries, drawing out lessons that have been learned and identifying areas where further reflection and analysis is needed in order to ensure future resilience. The Academy has supported two other series of projects focused on the Vaccine Hesitancy in the USA and UK, and Covid Recovery in the G7.

About this report:

This report summarises the research, findings, and conclusions of one of the awarded projects from the Pandemic Preparedness programme funded by The British Academy. The independent research findings and recommendations summarised in this report are those of the authors. They are not those of the Academy. The work that underpins this report was funded by The British Academy via a core grant from the Department for Business, Energy and Industrial Strategy (BEIS), now known as Department for Science Innovation and Technology (DSIT) and was carried out independently of Government.

Part 1:

United Kingdom

Canada

Germany and

United States of America

1. United Kingdom

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Introduction and methods

In this document we report on findings from a review and synthesis of literature produced between 2020 – 2023 on the impacts of the COVID-19 pandemic for the live performing arts. We examine the literature’s insights into pandemic effects, governmental and sector interventions, with a focus on empirical rather than opinion-based content. Because of the limited academic, peer-reviewed literature available during our research period, the material consulted is of variable quality and consists predominantly of academic research reports and reports by independent consultancies, government and industry bodies, support and advocacy organisations. Rapid production of this literature during the crisis has resulted in variable quality and partial knowledge. Our review, backed by stakeholder interviews and the advice of our Lived Experience Panel of industry professionals, aims to provide a comprehensive perspective that is cautious about potential biases. Some of those conversations are represented in our case studies.

Pre-pandemic context and background

The creative industries, including the sub-sector of music, performing arts and visual arts, were economically buoyant prior to the pandemic,¹ offering significant potential benefits for wellbeing, the environment, local place-making, and the UK’s global standing.² However, reduced public and local authority funding due to ‘austerity’ policies had prompted some subsidised organisations to increase earned and contributed income, adopt more entrepreneurial approaches, and favour less ‘risky’ creative programmes. A few flagship institutions dominated income generation in the sector.³⁻⁵ A competitive international marketplace^{1,6} and Brexit uncertainties had contributed to longstanding challenges, particularly for live performing arts touring.¹

Structural, social and regional inequalities across the UK and their mitigation have been longstanding sectoral concerns. Responsibility for culture is devolved, with government subsidies distributed through each nation’s arts development agency. The four devolved administrations differ in their approach to key areas such as creative education and skills,¹ and workforce and wellbeing issues.^{1,7} In England, Arts Council England (ACE)’s ‘Let’s Create’ 10-year strategy (January 2020) focused on increased access to creativity for all, building cultural communities and supporting innovation.⁸ Sustainability was gaining in importance, evident in new environmental reporting conditions for subsidised organisations.⁹

Historically the sector’s workforce structure lacked understanding and quantification. Recognition of systemic inequalities impacting on workers across the creative industries, including social mobility issues and disadvantages resulting from class, race, gender, geography, education and disability, is growing.^{4, 10-14} Disadvantaged groups were under-represented in decision-making and leadership roles,¹⁴ as were the freelance, self-employed

or contract workers^{5,12} upon whom the sector is heavily reliant.^{1,5,12,15-18} These workers' precarity^{7,19,20} is compounded by 'portfolio' modes of working.^{17,21-24} Unionised workers are commonly represented through Equity or BECTU. Common project-focused production models are seen as connected to these industry-prevalent employment structures and practices, leading to significant segments of the workforce experiencing a lack of access to professional development and visibility within human resources.^{11,12,17,25}

Policy and industry response during the pandemic

Policy response

For employed workers, individual assistance was provided through the Coronavirus Job Retention Scheme (JRS or 'furlough scheme'), announced on 20 March 2020. The Self-Employment Income Support Scheme (SEISS) was unveiled shortly after. Support for some freelancers was furthermore provided through the Jobseeker's Allowance and through local authority grants and emergency business grants through local authorities, departments and agencies.¹²

For organisations, a UK-wide temporary cut in VAT rates in 2020 and devolved business rates relief schemes gave support to leisure businesses,¹⁸ with additional support through raised rates of Theatre Tax Relief.²⁶

Following significant advocacy and lobbying from the sector, the Culture Recovery Fund (CRF), spanning three rounds between 2020 and 2021 and totalling £1.57 billion, was launched in July 2020. It was overseen by the Cultural Recovery Board for the Department for Culture, Media and Sport (DCMS).²⁷ For the English performing arts, it was administered by Arts Council England and distributed to organisations through a system of grants, loans and capital awards. Applicants had to demonstrate their cultural significance, significance to place,²⁷ prior financial viability and current financial need. £1.42bn CRF funding was awarded to cultural sector organisations predominantly in England.²⁸ The funding provided indirect workforce support by enabling organisations to assist permanent and contracted staff, albeit with limited benefits for freelancers via job supply chains.²⁹

The four devolved nations administered their own funds to support cultural recovery, using differing priorities and allocation structures.^{13,27} Arts Council England's initial Emergency Response Fund (ERF) supported organisational overheads and staff costs. However, its eligibility criteria disadvantaged individuals who were self-employed,³⁰ whereas the criteria for support in Wales, Scotland, and Northern Ireland were more flexible.⁷

£97m of CRF funds were released to Scotland through the Barnett formula.²⁷ Creative Scotland's 'Bridging Bursary' supported individual artists and communities and its National Arts Force and Culture Collective Programme paired up workers with community organisations,⁷ and there was direct support for freelancers.^{7,27}

The Welsh government announced an £18m rescue fund in April 2020, with Arts Council Wales administering £7m of this package.²⁷ Wales, which received £59m of CRF funds,²⁷ built on the Wellbeing of Future Generations Act, with the Future Generations Commissioner

overseeing the development of a Freelance Pledge that encouraged funded organisations to consider their support for freelance workers.^{7,27} Arts Council Wales' emergency support however had low uptake, and nearly half of freelancers surveyed there in 2020 reported receiving no government aid.²⁴ In both Scotland and Wales, the contributions and needs of freelancers were more closely integrated into government recovery discourses.^{7,16,27} Scotland supported closed venues directly through its Culture Organisations and Venues Recovery Fund and set aside money specifically for freelancers.

Northern Ireland, which in comparison with Welsh and Scottish per capita budgets suffered from existing underinvestment, received £33m of CRF funds. £5.5m went to an emergency fund to support organisations and individuals.²⁷ Uniquely, Arts Council Northern Ireland allocated specific funds for D/deaf and disabled artists.^{7,27}

There was criticism from within the sector of what were perceived as mixed and confusing government communications around restrictions, re-opening and recovery.

Workforce response

Workers themselves responded by promptly adjusting and adapting their practice,³¹⁻³³ taking up opportunities for training and upskilling.^{5,16,31-32} The pandemic exposed low levels of digital capacity in the performing arts sector and a scarcity of technical skills training and soft digital transferrable skills.^{34,82}

Across the sector, formal and informal networks were rapidly set up, Unions (BECTU and Equity) issued guidance and negotiated emergency terms with employers^a and pre-existing professional networks were repurposed to support the workforce.^{12-13,35-38} Online networks helped level the playing field and opened avenues for peer support,^{12-13,39} but were insufficient to tackle significant psychological stress.¹⁹ Problems arose from the disruption of established networks and some weak local networks.³⁸ The Freelance Task Force provided a mechanism for a collective voice of freelancers in conversation with funders, organisations and policymakers,³⁷ and Freelancers Make Theatre Work (FMTW) lobbied for greater government support for the creative workforce, drawing on data from a series of surveys focused on freelancers.^{5,23,25,40} In Northern Ireland, freelancers resisted formal organisation and networks.³³

Industry response

At the start of the pandemic, commercial and subsidised theatres alike struggled with being officially open while audiences were advised not to attend. Many commercial operators found that they did not meet the eligibility criteria for CRF support or for the government-backed insurance scheme for live events launched in August 2021.⁴¹ As the pandemic progressed, SoLT/UK Theatre, representing much of the commercial sector, co-chaired DCMS' Venues Steering Group for live entertainment and built a longer-term relationship with government. With Sam Mendes, SoLT/UK Theatre established the Theatre Artists Fund of £9.8m in emergency grants for struggling artists⁴¹ and led calls for tax reliefs and a suitably-backed insurance scheme to support re-opening; they also worked with unions and employers to

^a Conversations with Equity and BECTU representatives, 2023.

agree significant variation agreements on pay and conditions.^{41,b} While social distancing rules remained in place, many commercial venues who depended on 60-70% ticket sales were not able to re-open. Despite bumper audiences in 2022, by 2023 the commercial part of the sector was continuing to operate at a significant loss.^c

Prior experience of digital production and existing digital infrastructure, skills and resources, along with strong existing partnerships and relationships with non-cultural partners or significant experience of community engagement contributed to organisations' resilience.^{13,31,42} Where these strengths and partnerships were in place, organisations found themselves more easily able to pivot into digital activity or engage in work that sustained or built on local presence and contributed to maintaining staff skills and morale. Adaptability was not always linked to size, since some smaller organisations found themselves able to flex more easily,^{31,32} and some larger ones benefitted from significant existing investments.^{12,43} Some organisations changed their workers' contracts, while others adopted care-based processes that helped both their employed and freelance staff towards individual resilience.^{13,31}

A lack of actionable and detailed data, both about the workforce, and about audience behaviour and attitudes, was felt as a barrier for organisations wishing to understand how best to adapt. Academic research partnerships helped understandings,¹⁵ while a wealth of data gathering through advocacy groups and networks offered organisations additional insight, and sometimes led to mutual support activities.^{13,22,24,35}

'COVID-safe' practices and other adaptations

Alongside the pivot to digital during lockdowns and outdoor performances as restrictions eased, venues adapted by offering flexible ticketing (refunds, credits and exchange options for in-person shows)⁴⁴ and by implementing 'COVID-safe' measures, such as limiting numbers, scheduling arrivals, providing hand-sanitiser, ensuring social distancing, seating in 'bubbles', and adopting a 'COVID-safe' kite mark.^{21,45} SoLT/UK Theatre's "See it Safely" and "Ticketing Principles" attempted to establish UK-wide industry standards for operating theatre in line with official regulations.⁴¹ Events officers developed new administrative structures and systems, involving public health officials on 'safety advisory groups', which made it possible for small outdoor events to take place sooner.²¹

Workforce

Job losses and precarity

The pandemic and lockdowns disrupted the industrial ecosystem¹² and had a disproportionate impact on freelancers. There were significant job and income losses across creative sectors.^{1,7,16,19,24,46-48} Many freelancers exited the sector^{23,49} or diversified their income sources away from theatre.³⁵ As the pandemic receded, theatre workers returning to their roles found deteriorating pay,^{25,50} accompanied by reduced employment growth in the sector.^{51,52}

^b Conversations with SoLT/UK Theatre, Equity and BECTU representatives, 2023.

^c Conversation with SoLT/UK Theatre representative, 2023.

The typically complex working patterns of creative workers meant that many fell through the cracks of government funding:^{7,23,49,53,54} the SEISS requirements proved exclusionary for numerous freelancers with breaks in their employment or portfolio careers,⁷ as they did for some other groups such as limited company directors, and individuals who are D/deaf, disabled, or living with long-term illnesses.⁵⁵ As organisations went into ‘survival mode’ and turned their focus inwards, the remaining contracted workforce became less diverse,⁴³ and freelancers expressed anger towards the organisations that treated them differently from contracted staff.^{12,38}

Exacerbation of pre-existing structural disadvantages

The pandemic exacerbated pre-existing structural disadvantages^{7,10,12-14,25,54,56} and made the precarity of the workforce visible.^{14,17} Studies note persistent and worsening inequalities in relation to gender;^{5,10,16,41,49} ethnic or racial background;^{5,10,13,23,41,49} single parents and carers;⁵⁵ ‘at-risk’ workers who are D/deaf, disabled, or living with long-term illness;^{10-11,23,55} early-career stage or younger workers;^{10,17,23,57} the economically disadvantaged;^{55,58} those with a working-class background;¹⁰ and people living in some parts of the UK.¹⁵ Technical theatre staff who were left out of the sector’s early pivot to digital were disproportionately affected,^{12,48,54} as were those for whom pre-existing structural and cultural inequities created barriers to being able to rapidly move to digital modes of working,^{4,15} or to do the unpaid work involved in applying for funding.⁴⁹ There was a risk of aggravating self-exploitative behaviours by workers undertaking unpaid work^{19,33,49} and for those from within already structurally disadvantaged groups.⁴⁹ Those who enjoyed advantages before the pandemic were also more likely to be able to be financially resilient in the crisis.¹⁰

Impacts for those remaining in work

Some workers within the theatre industry who remained in work reported positive impacts resulting from working from home and the pivot to digital; this brought about some flexibility, wellbeing and inclusion benefits^{11,31,32,47} along with new opportunities and income streams.^{30,35,49} Creative freelancers turned to online spaces and platforms for support.³⁹ Continuing to work required a great deal of adaptability and multi-tasking.^{31,32,59} There is evidence of widespread upskilling in digital working methods^{12,13,31,32,35,60} and some inclusion benefits resulting from self-taped auditions.^{11,12,32}

The changing technological landscape required training,^{31,32,61} which workers often paid for themselves. Workloads increased for employed workers not furloughed^{13,31,32,62} and fundraising professionals increased their bid-writing activities.⁶² Additional stresses resulted from individuals (often backstage workers or those in administrative or managerial roles) having to take on multiple roles and responsibilities for which they lacked experience and qualifications^{25,32} or due to the ‘labour of compassion’ involved in offering support to others.⁴³ Remote rehearsals proved challenging for company cohesion and social interaction³² and those in work sometimes expressed concerns regarding the safety and quality of their work.⁵⁰

The pivot to digital did not work for everyone.^{4,12,14,15,17,38,43,48,54} Some reported a worsening of their work/life balance,⁵⁰ with negative impacts on those combining work with caring or

parenting.⁵⁵ Working from home brought health challenges⁴⁶ and a sense of ‘work dissonance’ resulting from changes in the working environment;¹⁹ dancers, for example, noted their physical deconditioning and loss of technique.^{36,63} There was a widespread substantial drop in the ability to maintain professional skills, with worse outcomes reported for the young.⁴⁷ Technical staff lacked the support to help them upskill¹² and substantial skills gaps emerged, especially for the creation of digital experiences^{13,53,64} and their marketing.⁴³ Organisations identified a loss of staff with transferrable skills, some of whom moved out of the sector. In the wake of the pandemic, burnout^{43,47} and older workers dropping out of the workforce resulted in skills and staff shortages^{13,25,29,43,52} especially in creative producing and middle-management roles.¹³

Case study: Tian Glasgow – a portfolio career

Tian Glasgow is a director and senior creative producer of theatre, arts and music events with a focus on social concerns and community engagement. His work exemplifies the portfolio nature of careers for many people working in the sector. He has his own company, New Slang Productions, but also teaches acting and works for the youth mentoring charity, Arts Emergency.

In late 2019, Tian had received an individual ACE grant and became an associate artist of Manchester’s Lowry Theatre, but all his planned new projects came to a standstill in March 2020. Amid worry about the survival of theatre and widespread general confusion and anxiety, he found himself having to make decisions about this and his own future as a creative practitioner. Some income stability and balance came through his work of Arts Emergency and the SEISS. But it remained unclear how or whether he should use his existing ACE funding. He felt that responses from funders that focused on outcomes sometimes left grant recipients in a difficult Catch-22 situation, where they had to use or lose money. He would have welcomed the creation of a calm and supportive environment in which he and other practitioners like him could recover from the initial panic, with time to reflect and respond in a more planned and considered way.

Mental health

Overall, these factors led to a dramatic deterioration in mental health across the workforce and in the country more widely.^{12-13,17,19,25,30,33,35-36,38,47,49-51,53-54,57} The UK government’s questioning of the economic viability of jobs in the performing arts in 2020^{12,31,54,57} contributed to a sense of loss of personal and professional identity, purpose and social value,^{12,36,47,49,51,54,57} while the focus of support on organisations led to freelancers feeling invisible and excluded.^{25,33,35} With networks and support structures destabilised,^{19,38,49} the effects were ‘psychosocial’^{19,49} because the sector is dependent on social networks for finding work and support. There was a low uptake of charitable support²³ and wellbeing services.⁴⁷

Organisations and their audiences

Relationships with the workforce

Performing arts organisations found themselves renegotiating their relationships with their workforce, with many introducing remote working and gratefully making use of the JRS scheme.¹³ Financial uncertainty, some early redundancies, and the loss of opportunities for cultural production generally, as well as for commissioning and supporting freelancers in particular, led to the prioritisation of permanent employees over contractors.^{40,43,58} There were expressed concerns over future impacts of a resulting contraction of the freelance workforce.⁴⁰ Initially there were some difficult and oppositional relationships between organisations and freelancers,^{12,33} with this described as resulting in some cases in a sense of a lack of transparency and dialogue³⁸ and a weakened sense of connection.⁴⁹ Organisations with previously high numbers of freelancers pre-pandemic were more likely to increase the intensity of working with them during the crisis.¹⁸ There were challenges with attracting and retaining talent,^{11,43,53} and concerns resulting from weakened capacity in key areas such as fundraising and human resources.^{13,43} There were also concerns that financial difficulties could encourage less equitable recruitment practices.^{11,43} As the pandemic progressed, organisations became increasingly concerned for the mental health and wellbeing of all their staff.¹³

The pivot to digital

Digital emerged during the pandemic as a means of continuing creative programme delivery and outreach during lockdown,^{32,64,65} an opportunity for e-commerce,⁶ and as a fundraising tool.⁶⁶ Those whose existing business models were not dependent on a building were quicker to pivot.¹³ Just under half of those in receipt of CRF money spent some proportion on developing digital capabilities.²⁹ However, there were significant uncertainties about how to monetise digital creativity,^{32,77} manage financial risk in production⁶⁴ and understanding audience behaviour in digital spaces,⁴³ all of which represented risks for recovery.

Digital created opportunities for more ecologically mindful performance and rehearsal practices involving telepresence technologies that reduced the need to travel^{32,68,69} and enabled some cost savings^{32,69} even as at the high end of digital production, costs could be prohibitive.⁷⁰ Digital performance was therefore identified as having the potential to solve some long-standing problems in the industry.^{31,39} The Creative Industries Council was refreshed and now includes digital experts who focus on the new audiences and skills required to deliver digital content.²

Moves to digital generally favoured larger organisations with existing digital skills, resources and infrastructure.⁶⁸ Concerns were raised regarding oversaturation of digital content in a market dominated by ‘big players’ offering high-quality, freely available archive recordings.^{13,32} Smaller players struggled to compete due to their need to charge for access,^{12,32} raising questions about the financial viability of online performances and digital platforms.^{36,60,71} Additional concerns arose about varying ‘digital maturity’ among companies,⁶⁸ the expectation of high-quality digital and hybrid content and ‘booking journeys’,^{70,72} and intellectual property and practitioner control over outputs and dissemination.^{36,43}

Business models, vision, values and mission

The sector was fundamentally unprepared for the crisis and the impacts of lockdowns and social distancing. Venue closures meant that organisations faced significant financial challenges and losses, with all having to reduce expenditure and many to dig into reserves.^{13,32,48} In the early months many expressed concerns that the crisis would lead to multiple closures and large-scale job losses.⁷ However, while there were redundancies and several high-profile closures, such fears were somewhat mitigated over the lockdown periods through the furlough scheme and dedicated sectoral support.¹⁸ CRF increased supported organisations' expenditure and re-inflated reserves,²⁹ although there was early unease about some apparently uneven distributions of funding.⁷ Concerns were expressed about the future sustainability of the sector in Scotland⁴⁶ and in Northern Ireland, where organisations in more rural areas were said to be facing particular difficulty.⁵³

There is some evidence of a divide in experience, impact and priorities between the commercial and the subsidised sector.^{13,43} Many commercial organisations resorted to 'mothballing' buildings and productions and furloughing their workforce until confident in being able to re-open to optimised financial returns.⁴ Subsidised organisations most reliant on earned income (including high percentage capacity and diversification into retail, hospitality or ticket sales) or stable project funding and those with large unused physical spaces were most economically affected by lockdowns and the requirements of social distancing.¹³ Organisations explored alternative ways of generating income, including through seeking funding for and using digital technologies, with some facing issues around lack of skills.^{13,32,34,64,66,82} Two theatres experienced community backlash after making deals with the criminal justice system that turned their spaces into temporary ('Nightingale') courts.⁴³

The pandemic created opportunities for reflection on the role organisations play in their wider ecologies. While there was disruption of existing creative and producing partnerships and collaborations, digital technology created some space for new ones.^{12,31-32} For some the pause in opportunities for traditional production led to a greater or renewed focus on community or civic engagement and their local publics, and for support of their surrounding creative, community or cultural ecosystems.^{13,43,48,77} A significant feature was the new development or strengthening of non-cultural sector partnerships and networks.^{13,21,43}

Audience behaviours: lockdowns and beyond

During lockdowns consumer habits rapidly shifted towards increased streaming and gaming² along with recorded music or dance performance,⁷³ with 43 percent of the population accessing the digital offer.¹³ Previously engaged audiences, including two-thirds of those who had engaged with culture online before the pandemic,⁴⁵ increased their participation.^{13,51,68,72,89} Audiences valued the 'always on' quality of digital content⁷² and some formed 'watch parties' to enjoy digital performances together.³⁶ 'Liveness' and 'community' were recreated online.^{20,32,74}

As the pandemic subsided, groups with low prior engagement with arts disengaged⁵² and a clear preference for in-person engagement emerged^{13,45,49,51,64,72,75} as feelings of 'digital burnout' and 'Zoom fatigue' set in.^{43,49} Outdoor performances facilitated a rediscovery of

place and appreciation of nature.⁷⁶ Audiences were willing to pay more for outdoor than for digital events⁴⁵ and leisure patterns changed towards more local participation.¹³ While digital engagement could certainly be convenient and sometimes more accessible, some audiences missed the ‘eventness’ and community-building aspects of live performance.⁷⁷

In-person attendance at live performance rose throughout 2021 and 2022 although many remained risk-averse,¹³ with rural areas more so than metropolitan centres.⁷² Scottish audiences were slow to return, resulting in a scaling-down of activity.⁷⁵ Social distancing long remained important,^{44,72} as did flexible ticketing.⁴⁴ Changes in audience behaviour were noted, including later booking and greater selectivity.⁷⁷ With difficulties re-opening venues, audiences slow to book, and a concern that they might never return,^{13,45,46} there was a move towards safer programming.⁷⁷

By autumn 2022, eighty percent of people were as willing to go out as before the pandemic,⁷² with younger audiences faster to return to in-person events.^{68,72} Nonetheless, visits to venues did not regain pre-pandemic levels.⁷⁸ Organisations struggled to maintain their digital offer while re-starting in person,⁶⁴ with some offering live-digital programme hybrids,⁷⁹ maximising accessibility by catering for the majority of D/Deaf and disabled arts participants who remained interested in the digital offer.^{68,70} Audiences for digital in late 2022 sought out ‘hyper-experiences’: in-person leisure experiences enhanced by bespoke software.⁷⁹ However, the expectation that digital programmes should break even makes it hard to compete with subsidised in-person provision,⁶⁸ which risks excluding a considerable portion of the population.^{68,70}

Later and longer-term organisational impacts

As the pandemic progressed, its impacts became increasingly nuanced. The stop-start of successive national and regional lockdowns and the ‘Tier’ system⁸⁰ introduced further financial risks and both organisations and audiences struggled with sometimes confusing government guidance. Many organisations reported facing continued challenges in recruiting and retaining staff. There were, however, some signs of organisational cultural shifts including greater recognition and embedding of freelancers within workforce processes and in business models,^{30,31} and interest in compassionate or caring approaches to organisational leadership.^{d,13,31,32,43} For those introducing new digital products or ways of working, freelancers may have been a vital source of skills, but there was little evidence of employment growth being associated with companies that pivoted to digital as a result of the pandemic.¹⁸ Theatres in particular expressed an increasing desire to return to live performance.^{13,43} Some charitable and subsidised organisations experienced decreased spending and increased income over the pandemic, with the CRF contributing to re-inflated reserves.²⁹ Supply chain issues and rising supplier costs bit hard across the creative industries sector as a whole, as organisations tried to recover and re-open.^{15,43}

^d Conversation with Carolyn Forsyth (Talawa), 2024.

Impacts of financial interventions

There were criticisms of the speed at which government support for cultural organisations was actioned, but agreement that, when they were eventually put in place, interventions such as JRS, various tax reliefs, and the CRF all contributed significantly to organisational survival.^{2,18,29} While the ERF helped organisations to maintain a level of activity and enabled skills development,³⁰ its funding was quickly disbursed but under-distributed among craftspeople, technicians, stage workers, production managers, and actors.⁷ ERF applicants with access needs received support,^{30,81} but the eligibility criteria again disadvantaged freelancers.⁷ The CRF successfully sustained expenditure of funded organisations, reducing the probability of their failure and additionally it delivered some small positive impacts on local employment and hiring of contracted staff. However, it had little impact on redundancies, most of which happened before it was announced.²⁹ It also did not support some significant commercial models, such as Special Purpose Entities often set up to finance single productions.²⁹ Theatres in receipt of CRF tended to focus on using it to cover day to day running costs and mitigate revenue shortfall rather than cultural production.²⁹ CRF funding decisions were not always viewed as transparent, and the application process was viewed as challenging.²⁹

Case study: Battersea Arts Centre (BAC) – organisational adaptation

Battersea Arts Centre's response to artists' feedback and pressure from freelancers during the pandemic includes providing free space and residencies for artist groups to develop new work. The programme structure has shifted from short festival-style runs to longer two-to-three-week runs, offering artists seed funding through commissions that enable them to access ACE and other funding. As part of its commitment to artist development, BAC has also introduced more international shows, enabling UK artists and audiences to engage with leading international work.

To enhance ticket affordability, most are offered on a 'Pay What You Can' basis, with higher-paying audience members supporting others. Shows are currently selling at about 80% capacity (up from 65% before lockdown), but overall, the audience demographic, which tends to be younger, better educated and more disabled than London theatre averages, remains unchanged.

These choices have led to higher artist satisfaction, although fewer local artists are now able to showcase their work and community-based work is difficult to fundraise for. Increased artist care expectations are straining resources, further limiting venue activity.

Outputs and Cultural Value

The 'pivot to digital'

The shift to online and non-traditional performance spaces and hybrid in-person-and-digital practices and outputs was key to how live performance responded to the pandemic and to the survival of organisations and creative workers.^{6,7,14,31,32,43,48,65-70,72,74} The pandemic accelerated the 'networked shift' that is leading to audiences clustering around specific interests, risking audience fragmentation, a shrinking of the mainstream and increased challenges for minoritised creatives.⁶¹ After the lockdowns, the streaming offerings rapidly decreased, especially among small and mid-sized touring, receiving, and producing theatres.^{68,70}

Digital accessibility

Digital performance brought issues of safeguarding and privacy,^{32,51,74} digital poverty and audience participation,^{7,15,51,64,74} but it also notably opened doors for previously excluded practitioners and audiences, especially appealing to Londoners,^{13,32} where half the sector's economic output is concentrated.² Overall, however, the gap between structurally advantaged and disadvantaged groups widened.^{13,72}

People of colour participated more in digital events,^{13,72} although ethnic minorities were less culturally active overall.⁸⁹ Disabled audiences and practitioners benefited from digital access,^{12-14,68,70,72} as did people with mental health conditions during the first lockdown.⁵¹ Parents and young families pivoted to digital during lockdown and subsequently quickly returned to in-person shows.^{13,51,72} Digital increased the visibility of attempts to engage young people in theatre,⁶⁷ with younger viewers preferring on-demand content.⁶⁸ Under-45s were important during lockdown because of their engagement with crowdsourcing, gaming and co-creator endeavours.⁶⁰

There was a drop in engagement levels with culture for older people,¹³ but older audiences did engage with streamed or recorded live performance, expanding demographic and geographical reach.^{32,64,68} However, older audiences were less satisfied with digital content, emphasising the importance of high-quality provision and ease of use.^{68,70,79}

Digital platforms

Digital content was provided on repurposed gaming platforms (e.g. Fortnite)⁶⁰ and established streaming platforms on which large organisations streamed free archive material that competed with new pay-for-view made-for-digital content on repurposed videoconferencing platforms.³² Digital content was also distributed via new bespoke platforms such as the BBC's Culture in Quarantine, which supported digital theatre activity across devolved nations.⁷

The inadequacy of common digital platforms for cultural engagement became apparent,⁵¹ as did the problem of platform dependency in the post-lockdown world in which platform businesses pivot quickly in response to changing conditions, creating uncertainty.⁶¹

Case study: Funlola Olufunwa, freelancer

In early 2020, Funlola Olufunwa, an actor, acting teacher, and emerging writer participated in a Creation Theatre project based on H.G. Wells' *The Time Machine*, staged at the London Library. Creation Theatre, an Oxford-based production company without a physical venue, had secured funding for the production by collaborating with Oxford University researchers who had integrated pandemic predictions into the script. This allowed the company to halt the show even before the first UK lockdown was officially announced.

The production was later adapted for Zoom, ensuring creatives received full pay. Actors were offered alternative work for cancelled performances. Funlola contributed by writing an adaptation of a classic fairy tale. She found the blurring of the boundaries between busy family and professional life in lockdown challenging.

As the pandemic subsides, Funlola reflects on the lasting impact of the shift to online auditions and the demands placed on actors for 'self-tapes' produced at short notice without technological support. She underscores the need for greater inclusivity in the theatre industry and stresses the importance of guidelines and union support to ensure fairness and accessibility.

Building and rethinking cultural value

There were broad campaigns in support of the arts,^{51,54} with calls to re-think questions of cultural value in relation to the legacy of the pandemic⁴³ and for the workforce.⁴⁹ In Northern Ireland, Scotland and Wales, recommendations and attempts were made to integrate culture into the countries' roadmaps for socio-economic recovery.^{7,53,83}

Cultural participation had wellbeing and mental health benefits for practitioners and audiences,^{32,51,56,60,72} helping build morale and community spirit,²¹ including in care homes.⁵⁹ The value of live theatre experiences for the young needs further research.⁶⁷

Key to participation, whether digital or in person, was a sense of shared experience, community and belonging, creating a sense of social connectedness.^{32,74,84} With many freelancers moving away from London during the pandemic and investing themselves in local communities,¹² the arts emerged as a vehicle for cohesion at local and hyper-local levels,¹⁵ with evidence of entrepreneurial placemaking in rural areas.⁶⁵ Representatives of Northern constituencies stressed the importance of culture for identity, place-making and 'levelling up' in the North of England.⁵⁶ The pandemic thus effected a re-orientation towards socially engaged community theatre and interest in local stories and place-making^{38,42,65} alongside outdoor performances.^{13,45,76} Governmental support, the willingness of funders to 'flex' existing funding, and CRF money enabled community and educational programming, with

funded organisations able to take more artistic risks than might otherwise have been possible.²⁹

There was an emphasis on creative innovation for social good,¹ with a focus on learning and participation and local community.⁴³ Local authority events officers adapted their approach, recognising the potential for events to contribute to a social and civic mission.^{21,85} Community-led responses connected government, cultural organisations and the public.¹⁵ Volunteer, community and mutual aid groups sprung up or were revitalised.¹⁵

As a side-effect, the pandemic highlighted the potential sustainability gains associated with digital^{31,32} and culture contributing to Net Zero targets.^{2,9,56} However, sustainability for the industry remains a ‘super-wicked’ problem because of emissions associated with touring and audience travel,⁹ rising costs,^{43,61} and rapid obsolescence and incompatibility of hardware and software creating obstacles to technology re-use in line with circular economy principles.⁶¹ As the sector navigates out of the pandemic, the environmental agenda may have become deprioritised,⁹ with tensions between those who view sustainability as crucial for future audiences and those for whom sustainability is only worth pursuing if linked to cost savings.⁷⁹

Systemic and structural issues

Revealed inequalities in the workforce

As has already been discussed, the pandemic made highly visible the structural inequalities within and precarity of the arts, culture and heritage workforce, as well as its reliance on the work of freelancers. Existing practices, including short-term contracts, low wages, and lack of recognition for costs sunk in the development of creative projects, were highlighted as potentially exploitative and likely to negatively impact on inclusion and diversity during the crisis.^{12,17,25} They were also described as contributing to individual employment vulnerability¹⁹ and exposing resultant underlying financial unsustainability in sub-sectors potentially more heavily reliant on such conditions, such as contemporary dance.⁸⁶ Issues were raised relating to a longstanding lack of access for freelancers to professional development and human resources.^{12,25} The absence of an overarching regulatory framework for the sector may have contributed to challenges in establishing fair working conditions.¹⁷

During the pandemic, a ‘show must go on’ discourse praising individuals for their resilience and flexibility in the face of adversity was viewed by some as continuing to mask the need for systemic or structural change.^{17,19,25} Wellbeing and mental health problems described as ‘endemic’ within performing arts prior to the pandemic, particularly for those living with financial instability and employment insecurity,^{25,86} were exacerbated. Pressure to re-open and a lack of a clear framework to support the process of doing so led many to feel under extreme pressure, with further detrimental impacts on individuals’ feeling of physical safety and mental wellbeing.^{12,43}

Contribution of theatre to social and economic recovery

Government⁶⁰ and industry studies⁵² emphasised the contribution of the creative and nighttime cultural economies to the UK’s economy: DCMS noted that creative and cultural industries contributed £115.9bn per annum to the UK economy before the pandemic and constituted twelve percent of the UK’s services exports.⁶⁰ It also stressed the potential of

digital to contribute to building international tourism and global audiences.⁶⁰ Scottish and Northern Irish government reports also asserted the potential for local culture and creative industries to contribute to national economies and social recovery.^{53,83}

This emphasis on the cultural sector as an industry that contributes to GDP stands in problematic contradiction with the fact that parts of the sector rely on subsidy because of an understanding of the intrinsic value of theatre as a social good.⁸⁸ The contradiction has implications for funding in the post-pandemic recovery⁸⁸ and partly explains why freelancers remained frustrated with what they perceived as a governmental failure to understand the sector and its reliance on freelancers and to recognise the holistic value of the creative industries.^{12,54,87}

Accentuated differences across regions and between devolved nations

The pandemic impacted on the sector differently across UK regions and within the devolved nations. Wales and North-East England were worst affected by sectoral job losses,¹ with Northern England suffering from longer lockdowns and higher COVID mortality than the South. Misalignments of COVID guidance and policy meant that organisations and individuals reported experiencing difficulties in working across multiple regions, across the devolved nations as well as internationally.^{4,12,43} Much cultural activity and some of the most high-profile institutions are centred in London and the South-East. An awareness of this imbalance contributed to renewed calls for stronger regional cultural leadership in the North during the pandemic recovery period.⁵⁶ Concerns were expressed within the sector about uneven allocation of crisis funding across the English regions.⁴⁷ Its distribution (highest in London and lowest in the North East²⁹) certainly reflects some existing imbalances, although perhaps not as badly as some had anticipated.⁴⁸

Strong local networks became important for support and knowledge sharing across the sector both for organisations and individuals.^{11-13,31,32,35,36,38,43,47} Freelancers developed more localised ways of working but also experienced differences at this level; some reported a lack of confidence and clarity in knowing how to access support and encountered a lack of funding for new or experimental forms of practice outside major urban centres.³⁸ HOME Manchester and National Theatre Wales provided geographically localised digital platforms for artists.^{13,39} Regional authorities, such as Greater Manchester and Sheffield that had strong relationships and a good understanding of the local cultural ecosystem, were able to offer targeted support to individual cultural practitioners and organisations, and these were well-received.^{13,48}

The devolved nations were perceived as being more supportive of individuals than England; their administrations set up schemes to specifically target freelance cultural workers, with – for example – some of these monies being distributed at the local level through local authorities in Wales, through sector support organisations in Scotland, or to minoritised groups in Northern Ireland.^{7,12} In contrast, Arts Council England's ERF funding applied a grant threshold of 50% income from self-employment, excluding many.⁷ Some of these differences were attributed to a closer integration in devolved administration policy narratives of the potential contribution of the cultural and creative sector to recovery and regrowth in Wales and Scotland,^{7,83} and to differences in approaches to the workforce and wellbeing exemplified in Wales within the Wellbeing of Future Generations Act.⁷ In Scotland post-COVID, there

remain significant concerns that government funding for culture is not keeping pace with costs, concerns around the tapering down of Theatre Tax Relief, and cost pressures from wages, utility price rises and supply chain issues.⁷⁵

Digital by default

As is discussed elsewhere in this report, the pandemic highlighted the structural effects of the digital divide in all senses. To a certain extent the pandemic led to the emergence of an informal set of digital practices by default rather than through planned innovation⁶¹ and – in the process – revealed an undeveloped approach to regulation surrounding intellectual property law and artists’ rights in the digital sphere.⁶ This led to concerns about implications for job security resulting from digital technology use, as well as the impacts of digital inequality in terms of access and skills within the sector.⁴

Funding infrastructure

The focus in England on supporting culturally significant organisations and buildings rather than grassroots activity or individuals was not always positively received and led to claims that money failed to ‘trickle down’ effectively.^{5,43} Some suggested that the approach may have worsened systemic problems in the workforce, increasing the amount of unpaid labour required of individuals^{11,12,17,19,33} or needed to support funding applications.⁴⁹

Although there were significant criticisms of the ACE approach to supporting individuals in the early stages of the pandemic, it was also praised for its rapid distribution of ERF,^{13,30} and for its streamlined and supported approach to application for this scheme.^{30,81} Despite criticisms around the delay in announcing and distributing CRF,⁸⁸ this was also largely welcomed, although its generosity has also been described as a ‘calculated necessity’ given an economic need to maintain the benefits of cultural diplomacy and support the wider creative industry internationally.⁸⁸

As we emerge from the pandemic, new funding for the ‘creative industries’ is building on existing support for a ‘creative clusters’ approach and responding to insights gained during the pandemic by focusing on driving R&D (mainly digital) in the regions as well as on skills development.² DCMS recognises the need for upskilling the workforce in creative technologies (‘CreaTech’), and is developing a strong focus for future funding on digital skills, AI, and immersive technologies.² This work is being supported by further partnerships with research institutions to gather the data required to understand the variety of benefits these approaches might provide.² In addition there has been some re-design of subsidy offered for projects and creative practice development to allow more applications from freelancers and individuals.⁷¹ ACE has also put in place further accessibility support,⁴⁸ and is further developing its Digital Culture Network, which provides technology support to the sector.

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2. Canada

Meghan Lindsay and Kelsey Jacobson

Aims, objectives, methods, limitations

This report offers insights gained through a literature review of information related to policy context, industry structures, and funding models operating in the live performing arts sector prior to and during the COVID-19 pandemic. In line with Canada's predominant model, the focus is on subsidized performing arts with less attention paid to the commercial sector. The data are centered on theatre but also include information on dance, opera, and music where relevant. To maximize the dataset, this report makes use of discursive pieces from blogs and newspapers; government papers, summaries, reports, surveys, and statistics; reports from sector-focused organizations; journalism and trade press articles; and academic literature and peer-reviewed articles when available. The data included come from qualitative, quantitative, and mixed methods empirical studies as well as reviews, analyzes, and opinion pieces published between 2020 and 2023. The majority of sources are English-language, although efforts have been made to attend to French Canadian and Québécois performing arts as well as to the particular concerns and interests of equity-deserving groups. Consultative meetings with more than forty stakeholders from federal, provincial/territorial, and municipal governments, unions, arts service organizations, funders, grassroots organizations, and artists have offered additional insight into the findings of the literature review. This report is limited by its broad scope and brevity, which the authors acknowledge cannot effectively represent the experiences and concerns of all relevant stakeholders.

Pre-pandemic context

While Canada's live performing arts operate in the form of commercial organizations, ad-hoc collectives, and unincorporated organizations, this report focuses on not-for-profit organizations, which constitutes the majority of publicly funded organizations. Support for the arts is through a "mixed" or "balanced" model, whereby non-profit arts organizations rely on a combination of public, private, and earned revenues.¹ Prior to the pandemic, the cultural economy was viewed as a measure of the sector's vitality. The live performance GDP grew at an annual rate of 5.9% between 2010 and 2019 and live performance jobs grew at an annual rate of 3.9% between 2010 and 2019.² In 2019, revenues from admissions to live performing arts performances in Canada totaled \$3.8 billion.² Despite a focus on the sector's economic impacts, live performing arts organizations experienced challenges in audience engagement, high fixed costs, competition for scarce resources, accumulated deficits, and issues of gender parity.³⁻⁵ Precarity for arts workers was of considerable concern. The majority of artists are self-employed (65% in 2021),⁶ and many lack job security and access to employer-based insurance and pension programs.⁷⁻¹⁰ The Canadian Artists and Content

^e CAPACOA (2023) Performing Arts Statistics. Available at: <https://capacoa.ca/en/research/statistics/#capf>

Creators Economic Survey (CACCES) revealed that 57% of artists surveyed ¹¹ earned under \$40,000 in 2019, indicating economic volatility and low incomes in the creative industry.^{xii}

Public funding for the arts is distributed among federal, provincial, and municipal levels of government, and arm's-length arts councils, with the Canada Council for the Arts, a federal Crown corporation, serving as the country's national funder. The cultural policies across Canadian provinces and territories vary significantly, reflecting different historical and cultural contexts. Over time, there has been a shift towards including broader objectives toward the democratization of culture, with varying degrees of government involvement and centralization in cultural policy management across the country.¹² In many contexts, arts councils serve as arm's-length agencies for various levels of government, which are central in determining how much the councils receive (and subsequently distribute). While processes of peer-review have been implemented at the council level, government priorities continue to shape funding decisions.^{13,14} In years prior to the pandemic, arts councils (notably the Canada Council for the Arts) adopted a public service philosophy, mandating that funded organizations demonstrate financial health, artistic excellence, and public value, reflecting a triple-bottom line approach to cultural investment.¹⁴⁻¹⁶ The decade preceding the pandemic marked an explicit turn toward government support for the arts and cultural sector as grounded in both economic and socio-cultural rationales.¹⁷⁻²⁰ Here, initial investments in the arts and culture sector were premised on rationales of job creation, economic vitality, creative industry policy, participation, export, and social cohesion²¹⁻²⁷ with a focus on digital creation and technology, supporting Indigenous artists, and diversifying participation and engagement toward the later part of the decade.²⁸⁻³⁰

Just as rationales for funding vary regionally, provincially, and territorially, so do sectoral challenges. Québec provides significant provincial funding to artists and arts organizations, linking funding rationale to the preservation of French language, culture, and identity.^{1,12} In Toronto, Canada's largest city, the pre-COVID arts sector faced issues of obtaining cultural spaces, retaining cultural workers, structural inequity for global majority and Indigenous folks, and international competition.³¹ Canada's North saw comparatively little funding or infrastructure for the arts, especially the Northwest Territories,³² and calls for increased funding (i.e. to Nunavut)³³ were recently addressed by new partnerships across governmental levels and between arts councils, foundations, and governments.³⁴⁻³⁶ Issues of equity, diversity, and inclusion (EDI) have been a focus for funders, policymakers, and organizations, pre- and during the COVID-19 pandemic, especially in light of reports on anti-Black racism, anti-Asian racism, Islamophobia, antisemitism, other forms of discrimination, and the legacy of colonial violence enacted on Indigenous peoples (First Nations, Métis, and Inuit).³⁷⁻⁴²

Policy and industry response during COVID

During the COVID-19 pandemic, the Canadian arts sector faced significant challenges, including job losses, revenue declines, and the challenges inherent in a rapid roll-out of relief initiatives. Despite these challenges, increased communication between government officials, arts associations, arts organizations, and artists allowed relief initiatives to more adequately

respond to the sector's needs.⁴³⁻⁴⁵ The government introduced various funding measures to mitigate the crisis faced by the sector, many of which were implemented without restrictive evaluations and reporting.

In the initial wave of Federal pandemic relief, the Canadian government announced funding initiatives to support the arts and culture sectors. On 17 April 2020, the government pledged \$500 million to establish the *COVID-19 Emergency Support Fund for Cultural, Heritage, and Sport Organizations*. Further details released in May 2020 outlined its administration by the Department of Canadian Heritage (with \$55 million to be distributed by the Canada Council for the Arts to help arts organization that support artists.)⁴⁶ The program was administered over two phases. The first phase was a formula-based top-up to past recipients of specific arts and culture programs. These funds were quickly allocated, with close to 75 percent of funds allocated by 29 June 2020. The second phase included funding for those that did not receive funding in Phase 1 and were not current recipients of Canadian Heritage or Canada Council for the Arts funding.⁴⁷

In March 2021, details of additional funding initially announced in November 2020 were released, with \$181.5 million coming from Canadian Heritage for the live arts and music sectors. \$25 million was spent to help stabilize the live arts sectors through existing programs (*Building Communities through Arts and Heritage, Canada Arts Presentation Fund, Canada Music Fund*).⁴⁸ \$116.5 million was distributed through the Canada Council for the Arts with \$50.5 million as a new digital innovation initiative to enable arts groups, collectives and organization to adapt or create works to be shared with virtual audiences (*Digital Now*) and \$66 million to stimulate increased research, creation and production of new work through the *Explore and Create* program. The Department of Canadian Heritage also delivered \$40 million in new funding to stimulate short-term contracting of workers in the live events sector, through the *Support for Workers in the Live Arts and Music Sectors Fund*.⁴⁹ This support was designed to help arts and music cultural sectors in immediately contracting and employing artists and cultural workers.

The Federal Budget 2021 included a commitment of \$1.9 billion to help support the arts, culture, heritage, and sport sectors.⁵⁰ *The Recovery Fund for Arts, Culture, Heritage and Sport Sectors* provided \$300 million over two years for additional relief to arts, culture and sport organization struggling with operational viability due to the pandemic (*Reinforcing Recovery Foundations* stream), as well as funding for the arts, culture and heritage sectors to lead organisational resilience, pursue business innovation, contribute to advancing equity, diversity and inclusion, and explore greening initiatives (*Investing in the Recovery* stream). *The Reopening Fund* provided \$200 million over two years through existing programs to support Canada's festivals, cultural events, outdoor theatre performances, heritage celebrations, local museums, and amateur sport events.⁵⁰

In February 2022, the Federal government launched the *Canada Performing Arts Workers Resilience Fund*, which provided more than \$50 million in direct funding to independent, self-employed workers in the live performing arts sector (up to a maximum of \$2,500 per individual, administered through four arts associations).⁵¹ In October 2022, \$10 million was also issued to 59 independent organization to provide cultural workers with advice, information, and professional development opportunities in financial management, mental health and wellness, legal assistance, and career transition, among other areas.⁵²

The 2022 Federal Budget included \$50 million to support Canadian arts, culture and heritage organisations that had experienced revenue losses, administered through existing programs (*Canada Arts and Culture Recovery Program*).⁵³ The 2023 Federal Budget did not see an extension of supplementary funds for presenting organization and festivals via the Canada Arts Presentation Fund. This budget did extend funding of \$14 million over two years for the Building Communities Through Arts and Heritage Program.⁵⁴

Arts service associations and arts councils took a more direct approach to convening community members to assess and address community need. Saskatchewan Arts, for instance, introduced PAOP lite, an entry level funding program aimed at providing governance, management, administration, and operational resources to previously unfunded arts groups.⁵⁵ The Government of Newfoundland and Labrador adapted its funding criteria to provide support to individuals as well as organisations.⁵⁶ The Manitoba Arts Council's Arts and Culture Sustainability Fund provided critical relief to organisations, emphasizing the importance of policy interventions during crises.⁵⁷ Similarly, the Arts Nova Scotia Board and the Creative Nova Scotia Leadership Council's consultations for post-COVID-19 recovery strategies engaged with artists and organisations to lobby for operational support and recovery policies.⁵⁸ The BC Alliance for Arts and Culture recommended developing intergovernmental strategies to support arts-based health programs and ensuring reliable internet access for arts organisations, indicating a policy shift towards recognizing the arts as integral to public well-being.⁵⁹ In addition to financial resources, arts service organization and councils were integral in collecting, compiling, and disseminating resources about public health measures, funding initiatives, relief programs, and supports.⁶⁰⁻⁶⁵

The organisational structures of many live performing arts companies made certain government relief initiatives incapable of addressing the sector's needs. The Highly Affected Sectors Credit Availability Program, which offered government-guaranteed, low-interest loans of up to \$1 million, was not well-suited for many not-for-profit theatre companies⁶⁶ and government support for the arts sector was criticized for being insufficient, not aligning with the self-employed nature of artistic work, and disproportionately negatively affecting Indigenous and IBPOC workers.⁶⁷ Like funding relief, the 'turn to digital' engendered a host of challenges, particularly a lack of viable digital resource strategies, inequalities in internet access, and a steep learning curve among arts workers.^{68,58} Additionally, the government's slow response in supporting commercial theatre compared to other countries was noted, with calls for increased government action to prevent the sector from becoming a casualty of the

pandemic.⁶⁹ Despite the challenges, the Canadian government's emergency benefits were crucial, with 56% of respondents from the Canadian Artists and Content Creators Economic noting that they sought government emergency support (including Canada Emergency Response Benefit (CERB), Canada Emergency Student Benefit (CESB), Canada Recovery Benefit (CRB), Canada Recovery Sickness Benefit (CRSB), and temporary COVID-19 relief through EI).⁷⁰

Workforce

The COVID-19 pandemic underscored issues of precarious employment among independent artists and freelance workers⁷⁰⁻⁷³ with significant job losses reported in 2020.^{71,73,74} The Canadian Artists and Content Creators Economic survey showed a 62% loss in creative income among respondents, with musicians and performing artists reporting income loss of 83% and 79% respectively.⁷⁰ Many artists were forced to find alternative employment, with some leaving the sector permanently.⁷⁵⁻⁷⁷ A particular challenge was faced by young professionals starting their careers amidst the crisis, with livelihoods disappearing due to the restrictions imposed on live performances.⁷⁸

Keeping workers in the cultural sector was noted as a significant priority among government, arts associations, and funders.⁷⁹⁻⁸¹ During the pandemic, organisations mobilized unrestricted granting opportunities to create work for artists who would otherwise be unemployed and arts councils sustained support for individual artists and arts workers through project-based and creation grants.⁸²⁻⁸⁴ According to the Labour Force Survey, employment among performing arts, spectator sports and related industries declined 11.1% between 2021 and 2022 (from 111,000 jobs in October 2021 to a total of 98,700 jobs in January 2022).^{85,86}

Throughout the pandemic, the workforce relied heavily on the Canada Emergency Response Benefit (CERB), which provided financial support to employed and self-employed Canadians directly affected by COVID-19 of \$500/week for a maximum of 28 weeks.^{87,88} In addition to CERB, one-time relief funds for individual live performing arts workers (i.e. Canada Performing Arts Workers Resilience Fund, Newfoundland's Artist Support Program), were distributed at the provincial/territorial levels through arts councils and arts service associations at various stages of the pandemic.^{51,56} The COVID-19 pandemic highlighted a need for income security in the arts sector and there has been significant lobbying for universal basic income (UBI) from individual artists, arts associations, and arts councils.⁸⁹⁻⁹¹

Two pieces of legislation were put forward to strengthen labour rights for artists. In 2021, the *Declaration on the Essential Role of Artists and Creative Expression in Canada* was put forward by former Senator Patricia Bovey and passed through the Senate. The bill highlighted the importance of arts, culture, and heritage to societal health and prosperity, affirming their role in social justice and reconciliation. Additionally, it provided a base for future legislation premised on the right to freedom of expression, participation in cultural heritage, artistic engagement, and non-discrimination.⁹² While the *Declaration on the*

Essential Role of Artists and Creative Expression in Canada highlighted the importance of artist rights and public access to culture, it was dropped in spring 2023. In 2022, The *House of Commons Standing Committee on Canadian Heritage Report on Strengthening the Status of the Artist in Canada* put forward a series of recommendations based on Status of the Artist Act and its impact on improving basic working conditions for artists. The recommendations suggest a comprehensive review and amendment of Canada's Status of the Artist Act and Copyright Act to better support artists, including provisions for bargaining, arbitration, and ensuring use of Canadian resources in government-funded projects. They advocate for tax measures to support artists, including deductions for income from copyright, averaging income for tax purposes, incentives for acquiring Canadian art, reforms to employment insurance, establishment of a binding arbitration process, and adaptation of labor laws to reflect the unique nature of artistic work, and ensuring fair treatment and sustainable incomes for artists.^{93,94}

Issues of systemic inequity were compounded in the pandemic. The high prevalence of self-employment, limited hours for women artists, and challenges faced by artists with children have created an increasingly precarious landscape.⁹⁵ The seasonal nature of work, prevalence of short-term and part-time contracts, dependence on voluntary roles, low pay, and closed professional networks, experiences of exclusion and discrimination within the industry were reported as challenges for newcomers entering the arts and culture sector, particularly for racialized new Canadians.⁹⁶

For those working in the arts in the pandemic, three times as many organization reported very high or high levels of stress and anxiety today (79%) as compared to before COVID-19 (25%)⁹⁷ and pervasive burnout was reported across the sector.^{68,97,98} Inequities persisted within compensation frameworks and labour, notably between salaried employees and self-employed or freelance artists.^{43,99-102} Amidst conversations of labour in the cultural sector, there has been a broader public discourse on definitions and expectations of work, namely that artistic labour cannot always be sold, and hence is removed from the market to be become decommodified, precarious labour.⁹³

Organisations and their audiences

In the beginning of the pandemic, organisations relied heavily on relief funding from arts councils, the Department of Canadian Heritage, and the Canada Council for the Arts. Relief funding was given to organisations that had previously received funding as a means of quickly disseminating funds. This caused disparities between smaller organization or those who had not previously received funding and those with “core” funding.⁴⁷ The National Arts and Culture Impact Survey (NACIS) noted that when organisations were eligible for a program, the vast majority used it. In 2020, 62% of the sample of 728 organisations surveyed were eligible for the Emergency Support Fund for Cultural, Heritage and Sport Organization and 89% applied (55% of total organizations). 51% of organisations applied for the Canada Emergency Wage Subsidy and 35% applied to the Canadian Emergency Business Account. The Canada Emergency Wage Subsidy and Canada Emergency Business Account were rated

as the most favourable benefits.⁹⁷ Commercial theatre and performance was not initially supported through government funding.⁶⁹

Across the country, organisations reported to need more sustained operational funding, claiming that short-term or project-based funding did not provide the stability necessary to mitigate risk and also contributed to unnecessary workload in repeated grant applications and reporting processes.^{68,103,104} Arts Nova Scotia's "Building Back Better: A Vision for Cultural Recovery" noted that language of innovation was often used under the auspices of single-project funding: new projects were presented through a lens of 'innovation,' stifling sustainability and impeding long-term growth, particularly in a time when they were simply trying to survive.⁵⁸ Some scholars also suggest the limitations of a funding model predicated on 'trickle down' from arts councils to arts organisations to individual artists when such supply chains are not in use and art is not being produced.¹⁰⁵

Many organization relied on the Canadian Emergency Business Account (CEBA) and the Canadian Emergency Wage Subsidy (CEWS).¹⁰³ CEBA provided interest-free loans up to \$60 000 for small businesses and nonprofits¹⁰⁶ and the Canada Emergency Wage Subsidy (CEWS) program provided a subsidy of up to 75% of remuneration paid by an employer to each eligible employee, up to a maximum of \$847 per week.¹⁰⁷ While the CEWS program did not prevent layoffs, it did help sustain organisational and administrative staff and some artists. This program was also responsive to the needs of organization that operate with a so-called 'lumpy' earned revenue wherein the majority of revenue is earned on a seasonal basis, such as festivals. As an example, Theatre Alberta's main source of revenue is their summer program for youth which happens once a year in July. CEWS initially determined eligibility based on an organisation's monthly drop in earned revenue, which disadvantaged organization like Theatre Alberta who do not have a regular monthly earned revenue. CEWS shifted to an averaging of three months' drop in earned revenue, which allowed Theatre Alberta to access support. As a result, the organisation could continue to offer services to its members, shifting from offering in-person workshops in communities across the province to a series of online Pay-What-You-Can sessions and moving the summer youth program online for 2021. Theatre Alberta offers a case study in which CEWS was highly beneficial to the organization after its parameters were adjusted, such that the organization was able to support artist contracts. It is important to note, however, that since most artists work on a contract and self-employed basis, the CEWS did not necessarily provide direct support to artists.

COVID-19 had devastating and multi-layered impacts on the arts sector, with Ontario, and the Prairies being reported as slowest to recover from an audience-perspective.¹⁰⁸⁻¹¹⁰ While provinces with fewer performing arts organization (i.e. New Brunswick) or high-levels of pre-pandemic cultural participation (i.e. Québec) experienced faster recovery, the long-term effects on the sector remain unknown.^{108, 111} Public health measures were addressed at a provincial/territorial level and resultantly affected the sector's capacity to reopen or resume productions differently in different provinces and territories. Variances in provincial funding

priorities^{112,113} and attitudes toward public health measures may also have contributed to recovery.¹¹⁴⁻¹¹⁷ During meetings with stakeholders, it was noted that the pandemic caused individuals in the arts sector to take on roles akin to public health officials. This involved educating the public, implementing regulations, and conveying health guidelines (which often varied across municipal, provincial/territorial, and federal jurisdictions). The addition of these responsibilities to their existing roles engendered excess labour burden on an overtaxed workforce.

Organisations reported cancellations and postponements of activities, concerns about revenue and fundraising, staff-related issues, audience retention, cash flow problems, a demand for stable support, and financial pressures from committed expenses like rent, and the need for additional support beyond regular grants.^{42,103,118-120} As reported across stakeholder consultations, a particular challenge was the management of physical infrastructure, including the maintenance and ownership of buildings by nonprofit organization.¹²¹

The pandemic also highlighted the lack of digital capacity in many performing arts organisations. While digitization was endorsed by the Canada Council prior to, and during, the pandemic, research suggests that adapting to digital content was challenging for many, with issues related to technological fluency and rural internet access.^{68,97} Here, the 'pivot to digital' strategy did not work for everyone. Artists and organization in rural communities, for example, did not have equitable access to high-speed internet that allowed them to participate in this revised marketplace.⁵⁸

Discussions about precarity, labour, and mental health have spurred a deeper look into the role of power and privilege in non-profit organisation structures. Voluntary boards and fundraising boards have been critiqued as exclusive, hierarchical, and rarely accounting for the lived experiences of artists.¹²² Some solutions have been the abolishment of the board system, a higher focus on EDI and decolonization in board cultures, a strengthened role between boards and staff, paying diverse board members for their labour, and requiring artist representation.¹²³

Arts service organisations continued to play a multifaceted role in supporting the arts sector through advocacy, visibility, and providing resources. While historically siloed and underresourced in their advocacy efforts, the pandemic has led arts service organisations to be more stronger and unified in their lobbying initiatives.¹²⁴⁻¹²⁷ Questions of jurisdiction continue to require attention.

Systemic and structural issues

The relationship between Canadian cultural institutions and Indigenous peoples has been historically fraught with exploitation and tokenism.^{128,129} These issues were compounded in the

pandemic, with Indigenous cultural workers noting that their identities could be exploited to gain organisational funding, that conversations of reconciliation were often used as lip service by arts institutions, that there was perceived funding inequity, and that issues of precarity were compounded among BIPOC artists.¹²⁸ In a recent report by LIL SIS, a grassroots, youth-led artist resource centre in Toronto, artists described having to exploit their identities for financial stability, noting the commodification of identity and trauma in racialized 2SLGBTQ+ communities as a fixation among funders.¹³⁰

For many Canadian artists, the evaluation of arts and culture in existing funding practices has frequently been the subject of critique, with arts funding described as “leaving artists feeling helpless,” rooted in an ethos of “neoliberal utility” focused on “difficult to measure effects.”¹³¹⁻¹³³ This is compounded by a funding landscape focused on data-driven impact analyses.¹³⁴ Navigating funder expectations amidst a declining philanthropic landscape is challenged by organisational capacity and increased labour expectations among arts communities.¹³⁵ Here, there have been propositions toward participatory grantmaking and trust-based funding models.¹³⁶ The CRA has amended the Income Tax Act to allow foundations and charitable organisations to issue grants, which is a broad change in the Canadian funding landscape, as larger charitable organisations will be able to flow resources to smaller, unincorporated entities.^{136,137}

In response to the pandemic, there has been increased interest in audience research. Data point to a significant shift in audience behaviour and attendance. In Ontario, an audience outlook survey suggested that across all genres, audiences are attending live events less frequently than before the pandemic.¹³⁸ In Alberta, hesitancy was noted as being fueled by more than just COVID. Despite higher comfort levels, hesitation to participate in activities is still present for a variety of reasons. The most notable is affordability, but issues of health and safety and dispersed cultural interest are also impacting audiences’ return to live performing arts.¹³⁹ Market conditions have suppressed spending and audiences have indicated that their threshold for poor experiences is low.¹⁴⁰ These trends seem to be most dire in the nonprofit arts sector, as the commercial live-music industry and indie scene are experiencing varying results across provinces and genres.¹⁴¹ Concerns over shifting demographics and attendance patterns also suggest a need to reexamine the subscription model of ticket sales wherein one audience member purchases tickets to an entire season and effectively requires an arts organisation to program to an imagined homogenous, stable audience.¹⁴²

Outputs and the value of theatre

Innovative online performances from theatre companies and platforms like the Social-Distancing Festival offered ways for artists to share work during the pandemic,¹⁴³ but this did not always translate into artists continuing to receive income.¹⁴⁴ A gap in skillsets and resources impacted who and in what capacity such offerings were possible, with some companies cancelling productions, moving performances outdoors, or creating other alternate-format performances in addition to, or rather than, going digital.¹⁴⁵⁻¹⁵³ One success

story is Outside the March's highly popular *The Ministry of Mundane Mysteries*, which was devised two weeks into the pandemic as a means to offer employment for artists during social-distancing and pandemic restrictions. The show occurred entirely over the phone with actors playing detectives attempting to solve personal mysteries for individual audiences. The show was performed to over 1200 households across twenty-three countries (thereby initiating international collaborations) and reports paying over \$150,000 to artists.¹⁵⁴

In terms of online performance, disability artists were highlighted as a particularly valuable knowledge source in digital and equitable performance making.¹⁵⁵ Accessibility was touted as a particular benefit of digital offerings,^{156,157} while international competition was emphasized as a challenge for Canada as it competed against offerings from larger English-speaking countries for audiences.¹⁵⁸ In moving live performance online, needs related to equipment, expertise, and capacity for digital production suggested stark differences across the sector based on pre-existing employee know-how, budget, urban/rural location, organisational capacity and more. The Indigenous Performing Arts Alliance's Tech Bundles program aimed to ameliorate inequity and build capacity for digital performance through the delivery of equipment and online tutorials to Indigenous communities across Canada for dissemination to community members at no or low cost.¹⁵⁹ The pre-existing FoLDA (Festival of Live Digital Art), which is supported through arts council funding at municipal, provincial, and federal levels, was able to pivot to online formats with relative ease given its inherent connection to digital performance.¹⁴³ Large organization like the Stratford Festival already had robust digital programming through offerings of pre-recorded productions, but also initiated STRATFEST@HOME, a subscription streaming service with recorded productions, podcasts, documentaries, educational materials and more.¹⁶⁰

General momentum and focus on EDI related topics was noted during the pandemic, often through calls to action alongside changes in leadership, programming, or mission.¹⁶¹⁻¹⁶⁵ The Stratford Festival responded to the Black Lives Matter movement with digital initiatives and programming like *Black Like Me, past, present and future: Behind the Stratford Festival Curtain*, a Youtube video streamed online 6 June 2020 featuring Black artists describing the challenges of working at the Festival that received more than 17,800 view within three days.¹⁶⁶ Stratford followed *Black Like Me* later that same month with *Ndo-Mshkawgaabwimi - We all are standing strong Stories of endurance, resistance and resilience by members of the Indigenous Circle at Stratford*, a video highlighting the experiences of Indigenous artists. In an important partnership, Obsidian Theatre and the CBC (Canadian Broadcasting Corporation) Arts co-produced *21 Black Futures*, an anthology series of short responses to the question "What is the Future of Blackness" described as one of the biggest theatre projects produced during the pandemic. The series engaged playwrights, directors, actors and student respondents.¹⁶⁷

While concerns remain about follow-through on reforms and long-term commitment to such EDI initiatives, some organization made formative shifts towards increased access and community engagement. For example, the pandemic coincided with a shift in leadership and

a renewed focus on community engagement at Theatre Passe Muraille (TPM), a theatre company in downtown Toronto. During the pandemic, performances moved online and one of the two physical performance spaces in the building became a site for digital experimentation. Community programming also moved online through initiatives like a digital book club, and the company shifted from a subscription model for ticket sales to a Pay-What-You-Can-Afford model wherein higher-paying audience members subsidize others. Most recently, in the 2023-2024 season TPM embraced a collaborative leadership model. Community engagement continues to be a focus and has expanded to include an accessible transportation fund as well as community meals, panels, and workshops. TPM has adopted a relaxed environment for all performances and continues to offer performance nights for the Black-identified community as well as various accessibility measures including American Sign Language and audio-described performances. Building on shifts towards digital offerings during the pandemic, TPM continues to expand into digital fields as venue sponsor for the Performance and XR Virtual Reality Conference hosted by Single Thread and Electric Company Theatre, which started in 2020 as a means of bringing together creatives to discuss working in new media forms and is the first and only XR conference in Canada.¹⁶⁸⁻¹⁷⁰

COVID-19's forced closure of performance spaces and unemployment exposed gaps in the cultural economy and creative city arguments, birthing a new wave of discourse on the intrinsic effects of the arts on empathy, social transformation, social justice, and well-being internationally.^{135,171,172} Notably, the invocation of the civic/social role of the arts has the potential to overburden cultural production with the need to address social issues alongside artistic and economic achievement.¹⁷⁴ Such a burden echoes challenges in the reporting systems of public funding predicated on proof of impact.

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Stakeholders consulted

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Brad Lepp, Professional Association of Canadian Theatres

Zachary Moull, Professional Association of Canadian Theatres

Arden Ryshpan, Canadian Actors' Equity Association

Rebecca Burton, Playwrights Guild of Canada

Diane Davy, Work in Culture

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David DeGrow, Means of Production

Rebecca Vandeveld, Means of Production

Jason Li, Labour in the Arts

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Miriam Manley, BC Touring Council
Adam Mitchell, former Edmonton Fringe Festival
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3. Germany

Ronja Koch and Heidi Lucja Liedke

Aims, Objectives, Methods

The aim of this report is to provide an overview of the situation at German theatres and in the independent performing arts scene during the COVID-19 pandemic. The focus lies on the questions of what funding opportunities existed and who they reached. In Germany, a substantial amount of material has been provided by the German government as well as by alliances for the independent performing arts, such as the Fonds Darstellende Künste, the Bunderverband Freie Darstellende Künste and the Deutscher Bühnenverein.

The terms used in the report are *freelancers* and *permanent employees*. Freelancers work on a contract basis, usually only on a project basis, whereas permanent employees have a multi-year contract with theatre institutions.

Pre-pandemic context and background

The theatrical landscape in Germany is strongly characterized on the one hand by city and state theatres with their own ensembles and repertoires and on the other by the independent scene. Independent artists do also have established collaborations with theaters or guest theatres in which they repeatedly show their work. Due to Germany's history, some statistics emphasize an East-West comparison.

In the years 2018/2019 prior to the pandemic theatre visits and therefore ticket selling increased, which correlates with the increased range of performances. At the same time, a decline in the number of season ticket holders took place. Nevertheless, income increased here too, as with the other ticket types.¹

The most important funding entities financed by the German government include the Bundesverband Freie Darstellende Künste (Federal Association of Independent Performing Arts, BFDK), the Fonds Darstellende Künste (Fund for the Performing Arts), the Bündnis Internationaler Produktionshäuser (Alliance of International Production Houses), and the Dachverband Tanz (Umbrella organization for dance).^{2,3} Over the last years, the funding situation for the performing arts sector had improved. But still, the legal foundations for self-employed individuals in artistic professions were complex, and the regulations inadequately accounted for the working methods.⁴ There was a lack of affordable rehearsal spaces and a shortage of skilled workers, particularly in the technical and administrative areas.^{5,6} It was already clear that over the next ten years, many of today's employees would retire, making up 50% of the skilled workforce in 2019.⁷ In 2018-19, the #MeToo debate garnered significant attention.⁸⁻¹⁰

There has been an ongoing discussion regarding the inclusion of culture in the Basic Law. In Germany, cultural funding is mainly in the hands of the federal states and local governments,

as formulated in Article 30.^{11,12} Not only are the arts promoted, but artistic freedom is also enshrined in law, allowing cultural institutions to defend themselves against right-wing attacks. Since 2016, there have been, on average, at least two cases of right-wing attacks against cultural institutions, festivals, and artists each month.¹³⁻¹⁵

Policy and industry response during the pandemic

General:

During the first lockdown in March 2020, the government made the decision to shut down all sectors, including cultural institutions such as museums, galleries, and theatres.¹⁶

In 2020/21, the global pandemic had a profoundly detrimental impact on the cultural and creative industries of Germany, causing significant challenges and disruptions: With a slump of -8.7%, it recorded their biggest setback in 2020 since 2009, when the development of the cultural and creative industries was first observed. The performing arts sector reached a turnover level similar to 2003, reversing 18 years of growth. A slight improvement took place in 2021 and 2022, but that didn't reach half the pre-crisis level.¹⁷ In the 2019/20 season, public theatres in Germany offered their audiences a total of 230,200 seats in their 774 venues. Compared to the previous year, there were around 29,200 fewer seats. Contrary to expectations, all East German federal states are above the average of 2.8 seats per 1000 inhabitants. Saxony is in fourth place in the ranking and the first East German state.¹⁸

Finances:

In 2020, the collective spending on culture by the German government, federal states, and local governments amounted to €14.5 billion. This figure marked a substantial increase of nearly 16%, (€2.0 billion more than the previous year). Consequently, cultural expenditure in 2020 was 55% higher than it was in 2010.¹⁹ With an increase of approximately €155 million compared to the previous year's budget, the budget of the Minister of State for Culture and Media exceeded €2 billion for the first time in 2021. Additionally, €2 billion were allocated for the German government's funding program for culture *Neustart Kultur* (New Beginning: Culture). *Neustart Kultur* played a central role as the primary foundation that enabled artists to continue working despite the closures. For the first time, research processes were also promoted on such a large scale.^{12,13,20}

State vs. Federal States and Local Governments:

In 2020, the German government, states, and local governments spent a total of 175 euros per resident on culture. As in previous years, local governments contributed the largest share of public cultural expenditure with 5.7 billion euros (39%), the states financed the cultural sector with €5.6 billion (39%), and the German government provided €3.2 billion (22%). The German government's expenditure increased by 53% compared to 2019, which was significantly more than the increase of expenditure of the states and local governments.¹⁹

Generally, local governments face constraints in terms of cultural budgets, highlighting the heightened significance of German government funding amid the pandemic. According to a survey of the Fonds Darstellende Künste conducted in 2021, 54% of the freelance artists

received funding from the federal state in which they are also members of a regional association or where they are most active. Slightly more than half (51%) utilized federal funding instruments, local governments enabled funding for only 31%, 25% received funding from regional government, and a noteworthy 6% from a federal state other than their own.³

Politics:

The current coalition agreement from 2021 states that the federal states want to anchor culture in its diversity as a state objective, improve the social security of freelance artists, and continue *Neustart Kultur*. This is the first time that nationwide culture funding is included in the agreement.^{21,22} Article 28 of the Basic Law states in this regard: "The local governments must be guaranteed the right to regulate all matters of the local community under their own responsibility within the framework of the law." From a legal point of view, however, this supposed duty to finance culture is only a voluntary task. Therefore, in times of tight public budgets, funds for cultural purposes are often cut, making them the "Achilles' heel" of cultural funding.¹³ In order to strengthen the visibility of the topic and bring it into public discourse, several artists established the petition "Kultur ins Grundgesetz Petition" in 2023, because according to them, culture and art can only be free and fulfill their societal mission if they are given the necessary acceptance at the federal political level.²³

Workforce

Funding structures:

Already in the early stages of the COVID-19 pandemic, funding opportunities for the performing arts were quickly facilitated at state and federal level.²⁰ The culture sector was the only one to receive its own stimulus package. *Neustart Kultur*, the German government's funding program for culture, launched in 2020, was valued at regular intervals and increased over time from initially set at €1 billion to €2 billion. This corresponds to half of the German government's usual annual budget for culture. 160,000 applications were made for these grants, 75,000 were granted which translates into €1.7 billion out of which €1.5 billion has been spent. The program ran until June 2023 and was the first nationwide funding program on this scale. It focused on securing Germany's cultural infrastructure and maintaining and creating new employment and income opportunities for artists.^{12,20}

In our interview with Carolin Bossack, representing the theatre, dance and performance strand of the federal department of culture and media (Fachreferat K27: Theater, Tanz, Performance, BKM) stressed the importance of weekly ad-hoc meetings between government departments and representatives of theatre associations, especially the Deutscher Bühnenverein, which were characterised by hands-on approaches and a communal atmosphere.^{2,5,6}

But many artists and organizations were confused about how to access the different funding sources at the state or federal level. This was not an inherent compatibility problem between the two levels, but rather a challenge arising from the different funding programmes themselves. However, the federal system contributed to further uncertainty as states communicated funding opportunities differently. They set up their own programmes that could not be used if federal economic assistance had already been granted. In some cases, especially at the regional level, comprehensive information campaigns about funding opportunities were not feasible due to a lack of available personnel.³

The overall alignment between funding instruments and the methodologies employed in independent performing arts was not entirely congruent. This incongruity was further compounded by the excessive bureaucratic processes involved. The disparity between the comprehensive range of financial mechanisms available and the diverse array of practices within the independent performing arts sector underscored the need for a more streamlined and accessible funding framework.^{24,25} The legal basis for freelancers in artistic professions is highly complex. Freelancers therefore incur considerable administrative effort and, at the same time, are very sensitive about their rights.⁴

The funding mechanisms primarily serve to finance projects in the field of the independent performing arts and the operation of public organizations. But there is neither support for training and further education nor access to become a “full-time artist” for young artists or career changers. Measures to improve working and living conditions and to secure an artistic life cycle are missing.²⁶ The funding itself is already product-oriented, and the process and application are not rewarded. All studies advocate for longer funding periods and higher funding budgets.^{2,27}

Good practice example Hesse: The funding landscape in Hesse distinguishes itself from that of other federal states, and a noteworthy development in this regard emerged with the implementation of new guidelines in 2023. These guidelines signify a strategic effort to simplify the process of accessing funding from the federal state, reflecting a commitment to fostering a more supportive financial environment for various initiatives and endeavors. The Hessian Ministry of Science and the Arts is thus taking up suggestions from the participation process for the *Masterplan Kultur* (Culture Master Plan). With immediate effect, the new cultural funding guidelines simplified the application process, funding conditions, and verification procedures, especially for grants of up to €10,000.²⁸ The masterplan was the result of an extensive participatory process which, for the first time, jointly considered the consequences of the pandemic and current cultural policy issues. The initial budget of €6.7 million was allocated in the 2023/24 fiscal year. The development of the *Masterplan Kultur* began with *Kulturatlas* (Cultural Atlas), a comprehensive survey of Hessian cultural landscapes published in 2018. The pandemic partially delayed and complicated the process but acted as a driving force to tackle the problems. This masterplan is the first cultural development plan of a German federal state that systematically addresses the pandemic’s challenges and outlines solutions. Particularly notable is the special promotional programme *Ins Freie* (Into the Outdoors) which facilitated pop-up outdoor stages such as the “Sommerbau” of Mousonturm (Frankfurt).²⁹

Freelance vs. Permanent Employees:

In 2020/21, a positive effect of registration for short-time work could be seen among permanent employees, so the number of permanent employees remained almost constant, while the number of non-permanent employees decreased significantly by 30% compared to the previous year due to a considerably lower number of events.³⁰

In 2021, the funding programmes within *Neustart Kultur* were expanded with Hardship-Aid, short-time work, simplified access to social assistance, tax relief and adjustments to the conditions of workers insured with KSK (Künstlersozialkasse/Artists’ Social Security Fund), a government-sponsored insurance provider for artists. The KSK ensures that self-employed artists and publicists receive similar protection under statutory social insurance as employees. The KSK supplements the amounts from a subsidy from the German

government (20%) and from social security contributions from companies (30%). It is not a service provider itself. It coordinates the payment of contributions for its members to a health insurance scheme of their choice and to statutory pension and long-term care insurance.

In addition to self-employed individuals, short-term employees in the performing arts were able to apply for assistance of up to €7,500 for the six-month in period from January to June 2021, with the aim of offering effective support for freelance actors and similar workers who are not permanently employed. Freelance artists had fallen through the cracks of previous relief measures because they are not self-employed as their main occupation but employed for short periods, e.g. for guest performances. This made them ineligible for unemployment benefits and short-time work compensation. Because of the pandemic, they have been largely without employment opportunities due to pandemic-related restrictions.³¹ Even with these new measures, freelancers were the most affected segment of the creative workforce.¹⁶

In 2021-2023 the research project *Systemcheck* (Systems Check), initiated by the Bundesverband Freie Darstellende Künste (Federal Association of Independent Performing Arts), investigated the working situation of solo self-employed/hybrid employees.³² It revealed that while politics had in recent years worked on the deregulation and flexibilization of the working-world in favor of but the self-employed, they hadn't come up with suitable solutions regarding social security. Since 1991, KSK-members have quadrupled to 192,438 (2022). One in two workers in the performing arts field is self-employed, but very little is known about how self-employed/hybrid workers insure themselves against poverty in old age. Also, a growing hybridization between employment and self-employment can be observed, which is not compatible with the KSK-rules. The rules of access for voluntary unemployment insurance for self-employed individuals show that the system of self-employment is still underdeveloped.³³ During the pandemic, freelancers were advised to apply for unemployment benefit although they were still working. It has become clear that when reflecting on the sustainable improvement of funding mechanisms, the social situation must be addressed at least as urgently as artistic and structural aspects.²⁶ A shortage of skilled labor continued.¹⁷

Coping with crisis: institutions and their workers:

A survey about the financial situation of workers in the industry after a one-month lockdown in 2020 was conducted by Ensemble-Netzwerk (Ensemble Network). It covered 94 out of the 140 publicly funded theatres in Germany, which corresponds to 67% of all public theatres. The results showed that 48% of freelancers who work for institutions and who are insured did not receive any salary when the pandemic hit. Only 15,3% of the respondents were paid a full salary, 29.07% were only partially paid, 36.31% were not paid at all, and 18.96% did not know whether they would be paid and how much. The main reason for not continuing to pay wages was "force majeure". 19.5% of the respondents were informed by telephone, 56.6% in writing, and 23.8% had to obtain the information themselves. As the pandemic was legally categorised as force majeure, many artists no longer received payment.³⁴

There is an urgent need to reform framework agreements. Regarding the theatre landscape, theatres do not have uniform regulations. Regulations existed neither within the *Bühnenverein* (Stage Association; a politico-cultural organization representing the interests

of theatres and orchestras), nor within the federal states or individual types of theatres. This is symptomatic of the theatre industry's inability to cope with crisis.³⁴ But this is not only an institutional problem, as regulations are also lacking for independent creatives. As Hannah Jacob, a freelance dramaturg, states: "It must be a matter of initiating concrete, long-term structural changes in planning security, but also in planning capability for the independent performing arts."²⁷

The most affected:

Freelancers were the most affected theatre workers. In this group, in turn, older people suffered the most. As one freelance artist in Berlin stated, for example: "When we look at our pension statements, it's an indictment. They don't even look at it, or the lower fee limit is not adhered to. Nor is there any consideration of sick pay. We actually only get by so well because we are a community of solidarity. It's not because of the funding, but because of our structure."² A survey conducted by the Fonds Darstellende Künste revealed that nearly half of the surveyed actors and actresses had to use their savings to cope with the crisis. For many, this meant a reduction in their retirement security.²⁷ Dancers were also highly affected since there was already a gap in dance funding beforehand, which increased.³⁵ Like the acting scene, dance training is also undergoing profound change to tackle abuses of power. Because of recent cases, the dance scene is currently intensively discussing the need to abolish training structures that are destructive and encourage abuses of power.⁴

Gender Pay Gap:

A survey of the independent scene in Berlin by Koalition der Freien Szene Berlin (Coalition of the Berlin Independent Scene) showed that, broken down by gender, 32% of men were able to continue to make a living from their work, while only 17% of women did so. Overall, more than half of those surveyed said that the lockdown would cause them financial hardship; 75% were worried about their livelihood if the lockdown lasted longer. Across all fields of activity, among those insured by KSK, men earned significantly more than women (men earned €20,000 *per annum* while women earned €14,700). The gender pay gap, while barely featuring in the literature, is higher than the national average.^{4,6}

Organisations and their audiences

Audiences:

During the pandemic, the significant loss of audiences was, for the first time, discussed openly and widely. The question of how an audience can be reached is becoming just as important as the question of digital aesthetics.^{24,36,37} The number of season ticket holders for theatres has been declining steadily for the past 20 years, but thinking about audience development is only now moving to the foreground, as the pandemic has accelerated the decline in the subscription audience. That is why *Neustart Kultur* especially funds audience research.^{20,38}

An example of good practice is the theatre in Chur (Switzerland). Here, the pandemic acted as a catalyst for audience development. Since 2021, they have been digitising their offer with significant success. The first Swiss digital dramaturg Yves Regenass, who is known for developing theatre games with the German-Swiss group "Machina eX", makes this theatre more digitally oriented. A workshop on the potential of digital theatre he initiated involved employees from all departments.³⁹

Digital audiences need to be drawn in differently. As the artistic director of LOFFT Theater Leipzig explains, especially online talk formats were appreciated during the pandemic: although they were designed for a Leipzig-based audience, people zoomed in from all over Germany. This indicated that, even amidst the challenges posed by the pandemic, the theatre space continued to be valued and recognized as crucial for meaningful exchange and discussion.⁴⁰ Platform thinking enhances the adaptability of the performing arts, facilitates the participation of the general population, and makes it easier to incorporate external expertise to address the existing deficiencies in one's own system and introduce different knowledge into the processes.⁴¹

The pivot to digital:

With the pandemic, many new digital formats were developed, and many attempts were made to reach audiences in this way. However, overall, the production forms often remained underdeveloped and took the shape of streaming, recording, or mimicking analog formats that were recreated in the digital realm. AI-based processes are only used in the arts to a limited extent and have only recently begun to be used increasingly in the performing arts. The current funding periods are completely unsuitable for AI productions because more research and knowledge-gaining are involved in devising this type of work.⁴²

To date, there is a single programme of study at the Dortmund University of Applied Sciences that connects digitality and the performing arts and there are two programmes at the federal level: the *Autonom* programme and the *Link* programme. The *Autonom* funding program comprised €1 million euros and was designed to establish a bridge between AI and art. Artists and ensembles from the fields of dance, theatre, performance, puppetry and musical theatre were eligible to apply. The *Link* funding program had an interdisciplinary focus between science, technology and culture. In 2021, ten projects were funded with €10,000 euros each. Part of the program was also the AI School, which offered 20 artists from the fields of music, theatre, museums, education, literature, film and architecture the opportunity to learn how to program AI applications themselves and apply them in their own artistic work.^{41,43,44}

Case Study: Staatstheater Augsburg

The Staatstheater Augsburg has played around with alternative ways to retain audiences since summer 2020 and is still offering unusual ways of experiencing theatre. On the one hand, the theatre has added a digital theatre department to complement its departments of ballet, musical theatre, performance and orchestra. They use stages with 360° videos, stage hybrid productions which combine the physical space of the stage with that of the virtual realm, have different streaming offers and also run a Discord server which people can use to meet up or discuss pieces they have seen and engaged with. Driven by Tina Lorenz', Head of Digital Theater, enthusiasm for anything digital, given her former membership of the hacker collective Chaos Computer Club, the theatre came up with ways to connect people with the theatre early in the lockdown. They began to offer their spectators productions they could view at home by ordering VR glasses provided by the theatre or by streaming them onto their own VR glasses – something that the Süddeutsche Zeitung has referred to as a “great coup”. As Lorenz explained, these glasses had already been bought out of the theatre's own funds along with 360° camera equipment before the lockdown thanks to a lucky coincidence: the theatre had planned to stage a VR show in May 2020, an opera including virtual elements. The Augsburg agency Heimspiel was in charge of the technical realization – so everything was taken care of in-house and/or by local agencies.

Case Study: Staatstheater Hannover

At the Staatstheater Hannover the pandemic has helped to drive digitalization forward. This is also visible in the organizational structures: whereas before the pandemic, there was only one person responsible for digital transformation, now there is a whole department dedicated to information management and organizational development. Digital transformation is part of the daily business. When we talked with the director of this department, Linnja Naujoks-Auffenberg, it quickly became clear that a huge part of the digitization was necessary backstage. A new cloud-based collaboration tool which was set up shortly before the pandemic to connect the central departments and the administration made remote working possible.

Whereas the roughly two thirds of all employees of that theatre who work backstage and did not have direct access to digital structures before the pandemic, they now have the possibility to communicate via chat and access documents via cloud storage. This has led to more collaborative ways of working, with each department becoming more aware of what other departments were doing, and this has been a long-term achievement.

Similarly, Hannover's assistant director and 'Corona officer' (now an employee of the Information Management and Organizational Development department), Carsten Hausadel, reported that the digital offerings for the audience were well-received during the pandemic and also met high artistic standards. Both Tina Lorenz and Carsten Hausadel fulfilled the role of resilience manager during the pandemic. It is imperative to recognize that this role extends beyond merely addressing challenges in the realm of digitality. Rather, it should be conceived in a broader context, encompassing a proactive approach to crises in general or instances of "force majeure" that may precipitate performance cancellations.

However, many guests who felt that it could not replace the 'theatre experience' with interpersonal contact wanted a return to in-person performance. Many work processes in the theatre itself could be significantly improved, also strengthening the theatre's understanding as a collective composed of artists, craftspeople and the administration. Hausadel also stressed the energetic and spontaneous ways in which artists often took the initiative to implement safety measures or provide forms of entertainment for children, young people, and the public. Hausadel observed how adverse circumstances increased artists' willingness to find creative means of enabling people to participate in art. The theatre's survey on the role of 'remote working' among employees of the Staatstheater Hannover reveals that of the 115 respondents. The majority (79%) would like to work remotely in the future, and 66% regard the social component of this kind of work as "very good" and "good". These developments have significantly improved the wellbeing both of the artists involved and the administrative and technical crew.

Neustart Kultur:

In general, it can be said that *Neustart Kultur* was an unprecedented funding program. For the first time, the German government became the main provider of funding for art and culture. That enabled many artists to continue working during the pandemic, but also, to say it lightly, to be able to pay their rent. However, this is precisely where one point of criticism of the funding program comes in. *Neustart Kultur* mixed social assistance and funding.³⁸ The program, subject to scrutiny by the Federal Court of Auditors, drew criticism for its perceived excess complexity and inadequate implementation, as highlighted in the audit report. Notably, the funding allocation was not methodically determined based on actual needs. Rather it appeared to have been initially proposed without a comprehensive assessment, revealing a potential misalignment between the program's objectives and the practical considerations governing its financial framework. Only afterwards was there consideration of how the funding should be distributed. The culture ministry largely relied on project grants for cultural creators and companies. This delayed disbursement of money had the effect that individuals received much less money compared to institutions. The programme was structured in a detailed manner so that nearly 40 cultural umbrella and industry associations developed a total of 88 programme components, which represents a very high level of complexity, so high that the numbers were mixed up at least temporarily. Gesine Löttsch member of the Budget Committee of the Bundestag states: "This report clearly states 'Neustart Kultur' programme ignited a small straw fire but did not prepare the cultural industry for future crises. And that is actually the challenge. One-off support is of absolutely no help to many in the long run."⁴⁵

Artists' protests and collective lobbying:

During the pandemic, artists built strong connections with one another throughout the country to become visible and heard. In 2020, the artists' association Initiative Kulturschaffender Deutschland (Initiative of Cultural Workers in Germany) criticised the emergency aid programme pointing out that it "[did] not take into account the living situation of those affected". It took issue with the excessive bureaucratic burden, and with the length of time it took for freelancers to access financial support.⁴⁶ In Dresden the initiative *Stumme Künstler* (Silent Artists) protested every week, and #OhneUnsWirDsStill (Without Us, There's Silence) spread throughout Germany. Also, the hashtags #wirbleibenzuhause (we're staying at home) and #kulturtrutzcorona (culture despite corona) were widely spread in 2020, the first in order to promote staying at home and the second to stay home but still create art.³³ The crisis has strengthened the cohesion of the scene as well as the awareness of being able to make demands and be heard. The precarious situation was recognized and much discussed at the political level.

Business models, vision, values and mission:

Organizations received an unprecedented amount of funding. These unprecedented sums not only enabled an enormous increase in funding programmes, but also new, innovative funding instruments.⁴⁷ Nevertheless, the crisis has shown that parts of the cultural scene, not so much the large, public, and publicly run houses, but the privately organized arts, are particularly vulnerable. The *Fonds Darstellende Künste* has always reached across the country and across the different artistic disciplines, albeit with a relatively small budget. As the Director of *Kampnagle*/theatre in Hamburg states: "If suddenly this broad funding is endowed with a budget comparable to that of the elite support from the Federal Cultural Foundation, then it would represent a paradigm shift!" The programmes of the funds were expanded during the pandemic, and new ones established.⁴⁸

In 2021, for example, Fonds Darstellende Künste and the #TakeNote funding programme for the first time enabled the four state associations of Brandenburg, Saxony, Saxony-Anhalt, Thuringia to collaborate on a cross-state cooperation project. Their "Conference of Visions", held in the WUK Theater Quartier in Halle (Saale) on September 7, 2021, facilitated the professional exchange and networking of actors in the independent performing arts.⁴⁹ Such collective work and organization is particularly important for independent theatres in East Germany, as they are dealing with comparatively greater pressure of the extreme right.¹⁵ The pandemic has thus brought into sharp focus the longstanding structural gaps in the funding landscape and correspondingly in the artistic working world, and has highlighted the existential consequences of these structures for artists.⁴⁷

Structures/Systems

Digitality:

With only a few exceptions, Germany has hardly any independent, comprehensive, and clearly communicated digital strategies for the cultural sector at the state or institutional level (and even less so at the local level). According to a country-wide survey by the Kulturstiftung der Länder (Cultural Foundation of German States), only four federal states have a digital strategy for the cultural sector, while another nine have patchy guidelines and three have no digital strategy at all. The expert interviews that were part of this survey reveal that there is currently no code of conduct for digital spaces as part of a digital strategy. So far, funding measures have not been integrated into a federal state's digital strategy despite this being desirable. Sustainable approaches that provide more structural and less temporary support are not sufficiently widespread.³⁹

The Political Right Wing:

The right-wing Alternative für Deutschland (AfD) styles itself as the "defender" of artistic freedom, using a "völkisch-national" (national populist) sentiment as a cover for its efforts to minimize artistic freedom. In Berlin in 2020, for example, the AfD requested to cancel part of the subsidies for director and dramaturg Ulrich Khuon at the Deutsches Theater.¹³ The pandemic strengthened the political foothold of the AfD as they for instance used "anti-vaccine" campaigns to raise their profile. The party's political influence is still limited. Nevertheless, theatres in smaller cities in the east, where the AfD is increasingly represented in the state parliament, are facing the question of whether they are able to withstand the headwind from the right against performances that deal with right-wing populism.¹⁵

Theatre science ("Theaterwissenschaft"):

Germany has no tradition of academics investigating policy affecting the theatre industry and no tradition of research about the independent theatre scene. Academic points of view regarding the politics of performing arts are missing.^{27,50} *Fonds Darstellende Künste* is exceptional and exemplary in commissioning and publishing its own studies to evaluate its pandemic funding programmes.^{27,37,48,50}

#MeToo, Racism, Discrimination:

It is surprising how little about the grey and academic literature mentions racism, accessibility, and diversity at a time when associations, festival and theatres alike address the topic in workshops and conferences. Accessibility should be discussed more at an

institutional level, as currently it is principally small festivals and collectives that are concerned about their accessibility (e.g., the queer-feminist festival Nocturnal Unrest).^{51,52}

In 2020, for instance, the *Bundesverband Freie Darstellende Künste* organized the federal congress *UTOPIA. JETZT.* where, for the first time, the distribution of power in the independent arts scene was discussed.⁵³ The *360°* programme, which launched in 2018 and ran until 2023 is one of a handful of programmes that address migration-related diversity and the ongoing discussion about the lack of diversity on and off-stage. For the first time, the programme funds diversity development at a federal level.⁵⁴ Institutions such as the Staatstheater Hannover offer workshops for staff members and work internally on such issues, but many theatres don't have an offer for their staff members. Since the summer of 2021, the *Fairstage* model project of the Senate Department for Culture in Berlin has aimed to improve working conditions and reduce discrimination on Berlin's theatre stages.⁵⁵

In the pandemic years, cases of abuses of power, e.g. the case of the Maxim Gorki's director Shermin Langhoff, who is still the director of the theatre, were discussed in public.^{56,57} Structural issues are still treated as individual cases, which fit into the continuing abuses of hierarchical power relations at institutions such as the Staats- or Stadttheater. While the break from daily routines that came with the pandemic might have presented an opportunity for reflection and structural change, such change is perceptible neither in the literature nor in practice. The only exception are the value-based codes of conduct that have been adopted by the Deutscher Bühnenverein in 2018 and 2021.⁶¹

Outputs

The pivot to digital:

Digital strategies became necessary but were mainly lacking on a structural level, whereby many artists and groups found new digital aesthetics. The field of digital formats has grown considerably compared to 2019, partly due to the funding focus within *Neustart Kultur*.^{12,41,42,58} But working with software and platforms seemed to be much more fragile than the established theatre situation and was more prone to failure.⁵⁹ By using digital platforms and live online talks, a much broader audience could be addressed, including an "atypical theatre audience" through for example the integration of videogame aesthetics.³⁷ The German government wants to reinforce and invest in this "digitization push". In this context, however, accessibility and the creation of a safer space must be rethought.^{42,58}

The stress on screens and on looking brought about by the pivot to digital led to screen fatigue. This, in turn, created a space for an emphasis on voice and physicality, exemplified by the popular genre of ASMR (Autonomous Sensory Meridian Response) videos, which showed how intensely people respond to sounds or vocal qualities. Voice and vocals shifted into the foreground.⁵⁹

Digital platforms:

Many theatres used the pandemic to revamp their own online programs. The Staatstheater Augsburg, which has been running its fifth digital division since 2020, is one of the few theatres that used the pandemic to completely reposition itself. The Staatstheater Hannover

has also developed a coherent digital strategy. The heads of the digital departments, or resilience managers, played a crucial role in adapting both the programme and the internal structures to the new digital requirements.

However, it was not only the institutions that used their existing digital infrastructures as new platforms for audiences to discover a new digital aesthetic. Platforms such as the *Campus Freie Darstellende Künste* (Campus of the Independent Performing Arts) of the Bundesverband Freie Darstellende Künste were created. The core function of the platform is to collect and condense legal knowledge, present it in a comprehensible way and to make it accessible to the public. It provides information on the basics of self-employment and experts also share their knowledge on topics such as law, taxes, the Artists' Social Security Fund (KSK) and insurance.⁴

The pivot to outdoor:

Due to the hygiene measures, many artistic productions took place outdoors. Larger theatres such as the Mousonturm in Frankfurt were even able to set up new open-air stages. Here, *Neustart Kultur* or funding at state level, such as in Hesse, made it possible to set up new open-air stages and become more resilient. Online or in the open air were the few opportunities artists had to present their work.²⁹

Value, Community of Solidarity:

As the establishment of *Neustart Kultur* showed, the maintenance of cultural offerings was highly valued, as were supporting artists.⁶⁰ For the first time, the need to promote the development of knowledge, for instance in relation to technology, as well as the research process for an artistic production came to the fore. In addition, artists were able to receive funding without already having to show proof of other funding, as many funding applications require. Two vital measures that have been products of the “corona effect” are, first, that an improvement of the social situation of artists is part of the current coalition agreement and, second, that from 2024, minimum wages and unemployment insurance for artists will be anchored in the law on a state level (not yet at the federal level). As a consequence, artists and practitioners have come out of the pandemic with increased confidence in themselves and their work. A community as well as a feeling of solidarity was enhanced among theatre makers.

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4. United States of America

Barbara Fuchs and Rhonda Sharrah

Aims, objectives, methods:

This report offers insights discovered through a literature review and subsequent consultative meetings with stakeholders from the theater sector in the US, with a particular focus on California and New York City. Given relatively little formal research on the sector in the US, we have collected available studies from national and service organizations, as well as from SMU's DataArts program. Much of the data covers 2021 and 2022, with less information thus far on how theatermakers are faring as the pandemic recedes and the exceptional government support afforded during the pandemic comes to an end. Our research is therefore supplemented with specialized journalism and extensive interviews with stakeholders. Beyond our lived-experience panelists, we identified and interviewed a range of stakeholders who participated directly in crucial events during COVID, and who continue to be centrally involved in funding and advocacy decisions. Over the past few months, there has been in the specialized press and among various stakeholders an intensifying chorus of concern over the state of theater in the US; our goal is to understand what has been learned over the past few years so as to support the sector at a particularly difficult moment.

Pre-pandemic context and background:

The theater landscape in the US includes commercial theater (NYC's Broadway houses and their touring productions, plus a small number of other productions), a tier of 79 "resident theaters" across the country (often referred to as the "LORT" theaters for the association that convenes them, the League of Resident Theatres), and hundreds of smaller non-profit companies across the country. While this report focuses on the not-for-profit sector, it is important to note the permeability of the "commercial" and "not-for-profit" designations: work often emerges from the non-profit world, is "enhanced" with funds from commercial producers and makes money on Broadway. Broadway productions on tour around the US are then hosted by theaters or performing arts centers that often use those profits to subsidize their other offerings. Some companies also operate with a dual status, to enable them to take on for-profit work for some projects while applying for grants for others.

Before the pandemic, the non-profit theater sector was already facing an uncertain future. The subscription model, which had enabled companies to bank their box office proceeds in advance and count on an audience's repeated attendance, was already in decline, and most companies covered only about 50% of their costs with ticket sales. It was also becoming increasingly difficult to make up the difference between box office revenue and operating/production costs. Support from the federal government had been significantly reduced in the wake of the culture wars of the late 1980s and 1990s, with companies

increasingly forced to turn to state, city, and local government for support instead, with mixed success. The overall lack of public funding for the arts in the US was mitigated for decades by philanthropic support (corporate donors, large foundations, individuals). Yet long-term trends included the gradual erosion of support from the corporate sector, which several interviewees described as increasingly transactional and focused on its bottom line. By 2020, just a handful of national foundations funded theater, and they often changed priorities as their leadership changed. A Los Angeles Times piece characterizes donors now as “hesitant, recession-wary”.² Already under-capitalized, the sector entered the pandemic from a precarious economic position, which improved somewhat with increased government support and lower expenses as the pandemic began.³

Additional challenges include the dearth of arts journalism, to cover and promote productions, and the association of theater with other forms of high culture, often perceived as elitist and old-fashioned.

Policy and industry response during the pandemic:

On March 13, 2020, Broadway shut down—the first time in its history that this had occurred. Across the US, theaters cancelled productions and began to lay off staff, as they gradually realized that prolonged prohibitions against gathering indoors would make it impossible for them to reopen. In fact, the impacts would be enormous: through September 2021, “The total loss to the performing arts industry attributable to the pandemic [was] over \$3.2 billion, and changing COVID-related behavioral patterns decreased audience ticket demand by 20-25%.” There was an 88% drop in ticket revenue from 2020 to 2021 alone.⁴

This period saw an unprecedented turn to the federal government for assistance. Previously, “across all budget groups, local government sources of contributed income outpaced state sources, which outpaced federal sources,” while foundations, trustees, and individual donors were the largest contributors.³ During the pandemic, foundation support increased, as funders tried to offer a lifeline to grant recipients by postponing deadlines, waiving requirements, etc.⁵ These emergency grants even offered general operating support, which had previously become extremely rare. While government grants aimed for a similar flexibility, the most significant difference was in the role played by the federal government under exceptional circumstances.⁶

As the federal government began rolling out programs to address the acute economic crisis, theaters grappled with the complexities of applying for support imagined primarily for businesses. The Performing Arts Alliance (a coalition of performing arts advocates) worked to ensure that non-profits could apply for the Paycheck Protection Program (PPP) loans offered by the Small Business Administration (SBA).⁷ Designed to prevent mass firings, these loans would be forgiven if organizations could prove that they had been used on payroll costs, as most eventually were. The most important legislation to prop up the sector was the Shuttered Venue Operators Grant,⁸ operated by the SBA, which offered an unprecedented

\$16B, while focusing on businesses rather than artists. Crucially, securing the extension of this urgent legislation to the non-profit sector and its eventual passage required leaders to come together and pursue specific lobbying. One-time gifts from various foundations enabled the hiring of a lobbyist, who in turn helped get the legislation passed.^{7,9}

Over the course of the pandemic, 97% of theaters surveyed by Theatre Communications Group (TCG) received some form of federal assistance.¹⁰

Meanwhile, theaters experimented with other modes of reaching their audiences. New York's **Red Bull Theater** (led by Jesse Berger, one of our two Lived Experience Panelists), a small off-Broadway company specializing in Jacobean plays, was a pioneer in the streaming arena, moving quickly to take their habitual staged readings online. Yet they were forced to cancel their first planned livestreamed reading in March 2020 due to challenges from Actors' Equity, the US union for live theater actors and stage managers. The company did not consider a livestreamed Zoom reading to fall under the purview of a contract that covered in-person performances at their off-Broadway theater, but the actor's union disagreed. Until a new framework could be established for this hybrid work—live but streamed, or recorded live and then streamed—actors could not return to work, no matter how desperate their situation. Meanwhile, in Los Angeles, **Playwrights' Arena** (led by Jon Rivera, our other LEP) opted instead for producing distanced, rather than digital, work, with a performance of a drive-in devised piece, *March*, in an underground parking garage, to be experienced by audiences from inside their cars, with sound transmitted over the car radios. As reopenings became possible, producers hired "COVID safety officers," mandated by the unions, to oversee the many measures required.

Questions of theater's commitments and accessibility became newly urgent with the protests for racial justice after the murder of George Floyd in May 2020. A prominent collective of BIPOC artists issued an urgent challenge to rethink how the industry operates in the US: the *We See You White American Theater* (WSYWAT) manifesto [<https://www.weseeyouwat.com/>], soon signed by hundreds of allies, called for a decisive response to long-term inequities, demanding a "new social contract" with respect to cultural competencies, working conditions and hiring practices, artistic and curatorial practices, compensation and funding, accountability and transparency, training programs, and more.

In tandem with the urgent demands of WSYWAT, theater's move online led companies to rethink access for audiences. If traditional in-person attendance depended on potential audience members' resources, mobility, proximity to and comfort with the physical theater or performance spaces, and a host of other factors, streamed/digital theater could provide a welcome alternative, or at least an expanded mode for reaching audiences. During the pandemic, theater directors often expressed a desire to return to in-person performance yet preserve digital access for audiences unable or unwilling to go the theater.¹¹

In April 2021, 65% of audiences polled reported expecting to prefer in-person to digital once it was possible again. For digital experiences, respondents found free access, access to organizations/artists in other places, and a social component to be important. Prerecorded performances and livestream performances were equally popular.¹² Comparing arts participation online in 2022 to the first year of the pandemic, 82% of respondents participated in an arts event online in 2022, with 70% accessing archived performing arts events and 43% watching livestreamed performing arts events. Younger adults engaged more with digital arts (95% of 18–24-year-olds, compared to 68% aged 75 or older). Non-white respondents engaged with digital arts more than white respondents, especially Black/African American (91%), while non-Hispanic white respondents were more likely to attend in-person performing arts events (52%) than other groups. 29% of respondents reported engaging in digital arts more often than in the first year of the pandemic, 53% for livestreamed performing arts events either more often or at the same rate, and 62% for archived livestreamed events more often or at the same rate.¹³

Respondents were more likely to feel arts organizations were important a year into the pandemic—especially BIPOC communities. However, this was also coupled with a strong call for arts organizations to change to become more relevant to more people. Most respondents felt arts organizations have a responsibility to tackle social issues, with systemic racism being the top priority.¹²

Post-Pandemic:

The not-for-profit US theater finds itself in a deep and long-term crisis, exacerbated and accelerated by the pandemic though not entirely caused by it. Though the US economy has by most measures recovered, theater is not back to pre-pandemic numbers, with non-profit theaters averaging half as many performances and productions in 2022 as in 2018.¹⁴ Total ticket income in 2022 was 55% lower than in 2018.¹⁴ In a recent survey conducted by TCG, with 171 theaters responding across the US, “Fifty-five percent of responding theatres had budgeted for a deficit in FY24, a small decrease from the 62% projected in FY23 ... but still significantly higher than FY22 (30%) and FY21 (10%).” 27.9% of the respondents described their organizations as “struggling,” with an additional 1.7% choosing “not sure we’ll make it.” Even those who describe themselves as “holding steady” are worried about what will happen next season, and anticipate cutting productions costs as their response (48% did so in 2022–23). Rising labor and material costs compound the challenge of audiences’ failure to return fully.¹⁵ Exceptional pandemic subsidies are still keeping theaters in the black, but “the surpluses were temporary and may have concealed the sector’s fragility.” Meanwhile, contributed income makes up an increasingly large part of non-profit theaters’ budget: “In 2022, contributed revenue hit a five-year high and earned hit a five-year low.”¹⁴

Over the past few months, a number of highly visible theaters, including the **Public Theater** in New York and the **Center Theatre Group** in Los Angeles have announced layoffs and pauses/reductions in programming. Many more companies are offering reduced programming for the 2023–24 season, with fewer/simpler productions staged for shorter

periods, as each production costs more than it makes.¹⁶ The Off-Broadway League, which convenes a key group of NYC theaters, lists 31 productions running in late October 2023, down from 51 during the same week in 2019, with box office grosses down 41% from the equivalent period pre-pandemic.¹⁷ There has been a steady drumbeat of smaller companies closing (2-3 per month, per Greg Reiner, the director of theater and musical theater at the National Endowment for the Arts).¹⁸ With federal pandemic funding for theaters ending, advocacy for funding is theaters' top priority.¹⁵ Several stakeholders expressed the need for a "longer runway" of federal funding to reach a full recovery.

At the same time, the arts continue to be a major, and undervalued, part of the US economy. In 2021, the arts sector as a whole contributed more than \$1 trillion (4.4%) to U.S. GDP— a new high-water mark and more than any of these sectors: agriculture/forestry/fishing; mining; outdoor recreation; and transportation and warehousing.¹⁹ The latest Theatre Facts report calculates that in 2022, 2006 professional not-for-profit theaters contributed \$2.3 billion to the US economy through direct payments for goods and services, in addition to the substantial economic activity generated through their audiences and employees.¹⁴

Workforce:

The pandemic revealed just how precarious labor was in the sector. Although federal PPP loans were designed to keep the workforce employed, these were for employees, and did not apply to contract labor. Many theaters were thus able to retain some of their permanent staff, but not compensate the artists whom they had typically brought on board for a specific project.

Thus many theatre workers, particularly on the tech side, were forced to find jobs outside the sector and have not come back.²

There is widespread support for improved conditions (higher salaries, reduced rehearsal time, fewer performances per week, supporting a "burnt-out" workforce, full-time employment instead of gig work), yet a simultaneous recognition that this has hugely increased the costs for companies. Rising labor costs were a primary challenge cited in TCG's 2023 Compounding Crises survey. In California (one of the two cases we examined more closely) legislators attempted to compensate theater companies for the cost of taking on full-time employees instead of hiring for gigs; however, it was easier to pass the legislation than to fund it.²⁰ Arts service organizations in the state are also working to develop payroll systems that can support non-profits as they face an increasingly complicated regulatory landscape.²¹ At the same time, advocates for the arts are making their case for state/county/city investment by foregrounding the development and diversification of an arts workforce to match the population of the state.

The Otis College Report on the Creative Economy 2023, focusing on California, explicitly calls for standardized data collection on the state's creative economy generally and its workforce needs specifically.

Organizations:

Pandemic theater closures lasted a long time in the US, yet there were wide disparities among states and cities in terms of when performing arts venues were allowed to reopen, resulting in a kind of natural experiment. Preliminary data seems to suggest that theaters that closed for a shorter period of time are doing better today than those that closed for longer.²² There is also a general perception that those who moved more quickly to establish online connections with audiences and offered more in the way of online programming fared better than those who did not, but this has not yet been studied in detail.

Both of our LEPs, **Red Bull Theater** in New York and **Playwrights' Arena** in Los Angeles, went out of their way to preserve a connection with audiences and funders during the pandemic, as detailed above. Both cite government aid during the pandemic as critical to their survival, but note that all of that aid has now dried up. Both companies cite enormous increases in costs since the pandemic: Red Bull now aims to offer a streaming component for at least some of the work they present, which doubles production costs (camera work, editing, additional compensation for artists). Although Playwrights' Arena is not streaming, they have seen the cost of individual productions increase substantially, in part due to California legislation that limits who can be hired as a "gig" worker. Both companies have turned increasingly to collaborations as a way to address the new cost landscape, either fully co-producing, in the case of Playwright's Arena, or seeking hosts who can contribute a space, in the case of Red Bull. This maps on to the "sea-change" in the frequency of coproductions noted in the press.¹⁶ Red Bull no longer rents the larger off-Broadway theater it occupied for several years, as audiences have not returned in sufficient numbers to warrant the expense. Instead, they secure a new space for each production. They have undergone a "deliberate retrenchment," spacing out productions and postponing them on occasion to take advantage of co-production opportunities. Solo performers or "two-handers" address both cost and health-safety concerns. Both companies are also constantly fundraising for each project, and carefully considering costs. At the same time, Jesse Berger notes how theater companies have figured out how to address onerous safety regulations and requirements: "we've learned, we're ready" for a similar health emergency.

For decades, subscriptions had allowed US theaters to charge up-front for the work they would produce over an entire year, cultivate relationships with audiences, and mitigate the risk of presenting new or daring work by situating it within an overall familiar set of offerings. It is less clear what the model offered audiences, except perhaps for the stronger connection to an institution. (Some theaters moved to calling them "memberships," to emphasize this "insider" benefit, but this did not fundamentally change the audience calculus.) The subscription model has been eroding for decades, and the pandemic seems to have dealt it a new blow.²³ Audiences today report that they prefer to pick and choose, that they are not willing to see everything that a subscription would commit them to, and that their schedules are too unpredictable to accommodate a subscription. While theaters have experimented with more flexible packages (fewer shows, ability to combine shows and pick dates at will,

etc.), the general consensus is that subscriptions are no longer dependable as the backbone of a theater's operating model. Theatre Facts 2022 confirms that, for the theaters tracked, subscriptions now bring in 5.4% of total expenses (versus 10.2% in 2018), while individual ticket sales bring in 13.3% (versus 25% in 2018).¹⁴

Structural/systemic issues:

Audiences:

Hybrid work schedules have become much more common in the US, with about 30% of overall workdays now occurring at home.²⁴ The consequences on urban centers have been very pronounced: businesses that catered to office workers have closed, and the many theaters located in downtown cores are finding it difficult to persuade suburban audiences, in particular, to attend their performances.

Many theatermakers argue that audiences unlearned the habit of going to the theater, opting instead for the comfort of entertainment at home. Audience choices are also impacted by perceptions of crime etc. in downtown areas. Theater audiences in the US are predominantly white, well-off, and older, which has exacerbated the effects of COVID and the perceived ongoing reluctance to return in person.²⁵ In an October 2022 survey, 24% of respondents over age 65 were still waiting to attend in-person events, including 8% who said they would wait into 2023. Program interest remains a dominant barrier to attendance, most pronounced among patrons under age 64, whereas fewer older patrons share this concern. Older patrons and patrons with a stronger bond with the organization tend to be most concerned about COVID transmission, while younger patrons and those with a weaker bond tend to be more limited by budget. Though now receding, inflation had an outsize impact on younger, non-white audiences.²⁶

While there are some who argue that audiences have not returned because they do not appreciate the new emphases on BIPOC/social justice programming (note the constant refrain of “who wants to be preached at?” in the comments to *New York Times* and *Washington Post* articles about the current state of theater), it is unclear whether such programming is actually the issue. Theater companies are conducting audience surveys that try to gauge their support for diversity/equity/inclusion.

We found relatively little attention to new audience development/education/children's theater, generally because theaters are under so much pressure to solve urgent problems in the now.

Streaming and Access:

Despite claims during the pandemic that the accessibility of digital theatre was a crucial advance, “Zoom fatigue” is still widely cited, and most theatermakers emphasize their desire to be back in a room with audiences. There is very little streaming of existing productions, much less continued experimentation in the digital space. One exception is the non-profit

League of Live Stream Theater [<https://www.lolst.org>], which was founded to try to centralize the labor negotiations and technical expertise that so many theaters cite as obstacles to streaming their productions, and has had some success with highly visible Broadway or Broadway-adjacent productions. Founder Jim Augustine expressed to us that he is waiting for theaters to “jump in” in large numbers, which would in turn allow him to secure commercial sponsorship, based on the projected streaming audiences. The unions have worked out limited agreements, at least for the LORT theaters (no more digital tickets can be sold than would be available at an in-person production, for example), yet other obstacles remain, including playwrights or their agents worried about diluting the impact of in-person productions. The Digital Access Research Project (unfunded and loosely affiliated with Harvard) is exploring the legal landscape, including from the point of view of access for the disabled.²⁷ The National Endowment for the Arts (NEA), as a federal agency, could work on issues of access, whether geographic or for the disabled. In 2021 “increasing audience accessibility” was identified as one of the key ways to reimagine the industry in a survey of “theatre’s essential workers.”²⁸

The climate catastrophe:

The current crisis makes it difficult for theater sector to contemplate or plan for catastrophic circumstances, such as the next pandemic or the climate emergency. Yet these are far from remote possibilities. In fact, the effects of the climate emergency are already being felt: natural disasters such as fires and storms are already disrupting companies today—see the closures due to wildfire smoke everywhere from the Oregon Shakespeare Festival to Broadway, the January 2023 floods in San Francisco and Los Angeles, the October 2023 flooding in New York, to name just a few examples. In TCG’s most recent survey, climate crisis was ranked lower in urgency than other issues, but more than a third of theaters still cited it as a concern.¹⁵ In order to strategize for these challenges, the sector will need to undertake much more long-term and sector-wide thinking. While some companies (such as Red Bull’s co-producer Fiasco Theater) are already thinking about sustainability, they do not yet seem to be planning for climate-related events.²⁹

Organizational models:

Paradoxically, the pandemic freed artists from gatekeeping, pressures of the subscription season, etc. Much of the interesting work that emerged during that period came from artists working alone, who were able to create at home/in isolation, or for small itinerant or site-specific companies, who were used to putting on work in unusual spaces and thus found the transition to digital modes relatively straightforward. Companies (such as the LORT theaters) who were most closely associated with a physical site arguably had the most trouble turning their ships. There is also significant pressure for organizations to address their ongoing commitment to social and racial justice, and not to treat their 2020 responses as a temporary deviation from “business as usual.”

Many companies are now experimenting with new models, for both political and practical reasons. There is a new interest in horizontal/collective leadership models, and more skepticism about traditional organizational and compensation structures. Salaries for artists

have increased since the pandemic—a long overdue development and widely supported, though it has significantly increased costs. The *Association of Performing Arts Professionals* (APAP) is currently conducting a survey of salaries which may clarify what kind of salary structure best supports both artists and the organizations in which they are most productively embedded.

For all its progressive politics, the theater sector appears quite conservative when it comes to trying new models. This is partly because it is poorly supported, with little in the way of guidance, and largely because it is difficult to innovate or think long-term from a state of crisis. There are few examples the US of the consultants or experts that advise theater companies in Germany or elsewhere. Yet some companies may be forced into innovative measures precisely because of the current crisis situation—it will be important to assess the impact of those attempted solutions.

Some companies are already trying new approaches:

Cannonball, a producing organization working within the Philadelphia Fringe Festival, offers artists multiple modes of access: a fee schedule, open to all, or a grant process that prioritizes underrepresented work via a selection committee, or various modes of co-production, with a shared assumption of risk. Artists get access to space and front-of-house support; ticket revenue is shared. Founding producer Ben Grinberg believes the model could work year-round in a subsidized venue, but the concern is to preserve access for artists, rather than having one arts administrator, or even a small committee, make the decisions about who gets funded.

In a city strongly committed to rebuilding its arts infrastructure, the new **Detroit Public Theater** (which has a collective leadership model) was housed for 5 years by the Detroit Symphony Orchestra, in an underused rehearsal hall. As soon as DPT was able to secure a permanent space, via the long-term rental of a historic building which they remodeled, they announced a residency program. They then conducted workshops with other local arts organizations for a year to decide how best to organize the program, and have just launched it. In my interview with AD Sarah Winkler, I asked how others might learn from their experience, and they emphasized there is no bandwidth for sharing their findings.³⁰

The **Marin Shakespeare Company** (San Rafael, CA) recently announced their Open Access program, by which their new center will be open during 12 hours midweek for artists across the disciplines to use free of charge, to “develop work, connect with others, or just provide a space to focus.” The space is exclusively for “non-monetized creative development”—playwrights could write a play in the space, and directors could rehearse it, but charging for a performance there is not allowed.³¹

A highly visible case is New Haven's **Long Wharf Theater**, which had long rented a space on the edge of the city, accessible only by car. They recently gave up their lease and announced a new itinerant model, whereby they present work in a variety of spaces in the community, for the community, as part of bringing theater to a truly representative New Haven audience. Many in the field are cheering for them, although there was initially strong pushback from members of their board and some long-term subscribers. In my interview with AD Jacob Padrón, he stressed the difficulty and the necessity of the change, and expressed his hope that the sector would support greater experimentation and theaters taking risks with new models.

Communication/research/advocacy:

In general, there is a dearth of spaces in which to propose and assess new solutions. TCG, the national organization convening theatermakers, was founded by the Ford Foundation in 1961 "to improve communication among professional, community and university theatres in the United States ... and enable members to study each others' methods, with the ultimate aim of making the theatre more professional in training, creation and production."³² In practice, though TCG convenes hundreds of theaters, publishes *American Theatre*, and puts out much of the research on the sector, it cannot possibly take on all aspects of this work. Their advocacy and research departments, for a national organization, are staffed by one person each, and, like so many organizations post-pandemic, TCG is undergoing a leadership transition.

HowlRound [<https://howlround.com>] is a much more informal online "theater commons," convening theatermakers and publishing on a number of topics of interest to the sector. It currently undertakes neither advocacy nor research.

Grantmakers in the Arts, the national organization that convenes funders, has made "public policy and advocacy" one of its funding focus areas. The organization works to engage foundations in thinking about arts policy at the national level. It advocates for arts education in the schools and access to the arts for older Americans.³³ Crucially, it also educates funders on "advocacy and lobbying, the difference between the two, and how grantmakers can support both."³⁴

Outputs/how theatre is valued/policy responses:

The challenges of the theater sector in the US are those of US society more generally: individualism and a dearth of collective endeavor; precarization of workers; decreased investment in the commons; political polarization, social isolation. Yet theater has an opportunity now to make its case in relation to other post-pandemic revitalization efforts, including movements for social/racial justice, mental health, and, crucially, the revitalization of urban cores. While some of this might entail the "double burden" for theatermakers cited for the Canadian example, it remains the case that "art for art's sake" is a difficult argument to make in the US.

In the wake of the pandemic, philanthropic donations seem increasingly uncertain, while the sector is only beginning to work on more sustained advocacy to the government. There is very little institutional, sector-wide or long-term thinking, in large part because theatermakers experience a near-constant state of urgent crisis and are accustomed to siloed modes of working. While the pause of the pandemic did not produce wholesale change, the unprecedented level of federal funding available during that time helped theatermakers realize the importance of securing more government support for the sector, and may have seeded the institutional actors who will help usher in a new era.

The US has no Ministry of Culture or equivalent entity (even its Department of Education is relatively recent, and comes under periodic attack from the right). Federal government support for the arts is routed through the National Endowment for the Arts, whose budget has to be renegotiated every year. The budget for this year is \$207 million, an increase of \$27 million over the year before. About half goes to state arts agencies, which then make their own grants. Only \$6 million is administered directly by the NEA's Theater department, which then offers individual grants (the median grant in 2020 was \$20,000⁶).

Because the NEA's budgets must be renegotiated yearly, constant advocacy/lobbying is required to secure funds. One key advocacy organization for the NEA, Americans for the Arts, is oddly quiet at the moment, and does not seem to have emerged from the Me Too/anti-racist moment in great shape. The other is the Performing Arts Alliance, where theater is represented by TCG. They advocate not just for resources but for legislation impacting theater/the performing arts (visas for international performers, rules around wireless mics, regulations on ticket sales).

The new Professional Non-Profit Theater Coalition [<https://www.pntcoalition.org>] is now advocating at the federal level. They recently tapped Lin-Manuel Miranda to help them introduce ambitious legislation to provide \$2.5 billion over five years for US non-profit theaters. The amount is calculated to provide about 20% of each organization's operating budget and to ensure their ability to survive. "It became clear that we need to change the relationship of the American theater to the federal government," Maria Manuela Goyanes, artistic director of Washington D.C.'s Woolly Mammoth Theatre, said of the coalition's formation. "If you're not at the table, you're on the menu, so we are all going to make sure we are at the table."¹⁸ However, to date the initiative has not led to action.¹⁷

At the state, county, and city level, arts agencies and service organizations are increasingly making arguments that tie the arts to job creation and the recovery of urban centers. Appropriations for state arts agencies are projected to go down in 2024, continuing a trend of decreasing funding since the pandemic ended.³⁵ The largest percentage of state arts agency operating support grants are going to organizations with revenues less than \$50K with a median award size of \$3,000, but the bulk of operating support dollars are still going to larger organizations (budgets over \$1 million, and much higher average grant sizes). Equity

in funding can be estimated from geographic/demographic analyses but “large scale data collection or standardization across multiple types of funders that adequately describes who benefits from arts grantmaking simply does not exist.”³⁶

US foundations are grappling with a number of urgent social issues, and overall seem less willing to prioritize the arts than they once were. When they do, they are prioritizing BIPOC-led and other newer/smaller organizations. Historically, arts philanthropy has invested more resources in larger and less diverse organizations in wealthier urban areas, but grantmakers are currently taking stock of these practices to see where opportunities exist to balance funding and reach underserved communities. Though this is widely perceived as a just and necessary redirection, there is concern that withdrawing support from the larger organizations that anchor the theater landscape may weaken the entire ecosystem. Conversely, others worry that attention to BIPOC organizations may not be sustained.

Some non-profit theater organizations are also facing challenges in fund-raising closer to home. In the US, the non-profit 501c3 status requires having a board. In interviews, we sometimes heard about the gradual transformation of these boards: though constructive and healthy boards still exist, some are far more transactional and demanding than in the past; they treat the theaters as businesses; they have unreal expectations; they are not made up of theater people but of successful professionals in other fields who assume their expertise will transfer. Needless to say, these boards are far less diverse than the US population and even than the theater staff. Because boards are selected in part for their potential to support the theaters financially, it is far more complicated to diversify these boards than the staff of the theater or the theater offerings. (There are no laws in the US to mandate any particular composition of such boards.)

Amid so many challenges, organizing and national-level initiatives seem more feasible with Zoom as a tool for convening people. Working with partners across the country has never been easier. Indeed, TCG and other organizations now routinely hold “convenings” online, which makes it possible for theatermakers across the US to participate.

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Jim Augustine – Co-Founder, The League of Live Stream Theater

Julie Baker – CEO, Californians for the Arts (CFTA)

Teri Ball – Regional Advocacy Infrastructure Network (RAIN) Project Manager, CFTA

Laurie Baskin – Director of Advocacy, Theatre Communications Group (TCG)

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Stephania Ramirez – Executive Director, Perenchio Foundation (Los Angeles)

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Part 2:

France

Italy

Japan



5. France

Caroline Demeyère and Stéphanie Havet-Laurent

Pre-pandemic industry contexts

The French performing arts sector experienced significant growth between 2000 and 2017, with a 46% increase in the number of paid workers, totalling over 217, 000.¹ France developed ambitious cultural policies, aiming at the democratisation of culture and cultural diplomacy: the French ‘cultural exception model’ (*exception culturelle*).² As a result of this strong cultural policy, access to culture, particularly for schools, is very good even in outlying areas: public subsidies support school trips to the theatre and local cultural venues even in rural areas.

To underpin the policy, the Ministry of Culture, its regional directorates and local governments offer substantial financial support based on artistic merit and social impact: public subsidies, funding of infrastructures and production expenses. The unemployment compensation regime for performing arts workers (*intermittents du spectacle*) supports employment and mitigates work precarity. This social insurance scheme, which goes back to 1936, consists in financial support for performing arts workers (artists and technicians), based on the specificities of their employment: seasonal, irregular and uncertain, with multiple sporadic non-permanent contracts and employers. Firstly, it enables performing arts workers to be systematically considered as employees. They are hired based on an employment contract where each employer pays a salary that includes social contributions for healthcare, pensions, and unemployment. This creates an effective social security net. Secondly, it enables workers to combine unemployment benefits and part-time contracts, securing stable overall incomes. To be eligible, performing arts workers need to accumulate 507 hours of work per annum, regardless of the number of contracts.

The State encourages sponsorship via tax cuts. Yet only 24% of corporate sponsors supported culture, contributing €500 million.³ Theatre was especially overlooked.

There is a divide between the prestigious large organisations (e.g. Comédie française, Théâtre de l’Odéon) attracting public subsidies and sponsorships and generating high ticket sales revenues, and smaller local organisations which are in a deficit situation. The pre-pandemic context negatively affected audience attendance figures, with cost of living pressures and the threat of terrorism, especially following the traumatic Bataclan attacks, having an impact. The government implemented the *Pass Culture* scheme, which targeted young people, to bolster demand.⁴

Live Performing Arts during the COVID-19 Pandemic: Impacts and Responses

Policy and industry

The French government implemented three key policy measures to support the live performing arts and the broader cultural sector during the COVID-19 pandemic. Since France is a heavily centralised country, policy interventions were centralised and took place at a national level. This was complemented in places with extra financial support from local governments.

First, the French government provided financial aid to theatres and cultural institutions to help them cope with the economic impact of the pandemic. This included grants, subsidies, and loans to cover operating costs and prevent layoffs such as *le Fond de solidarité aux associations ayant une activité économique* (for any nonprofit with an economic activity)⁵ and the Cultural Emergency Fund Cultural Emergency Fund (*Fonds d'Urgence pour le Spectacle Vivant*)⁶. It provided financial support to live performance venues, including theatres, which were facing severe financial difficulties because of the pandemic-related restrictions. Local governments offered additional financial resources.⁷

To adapt to the pandemic, many theatres and cultural organisations turned to online platforms to offer digital performances and reach audiences virtually. The government supported these initiatives and provided guidance on streaming rights.⁸

Second, the government introduced a partial unemployment scheme (*chômage partiel*) to support employees in the cultural sector⁹. Under this scheme, employees could receive a portion of their salary even if they were not working or working for reduced hours. The 507 hours required to access the *intermittents* regime scheme were reduced, with two 'blank' years created in 2020 and 2021¹⁰. Social benefits could be accessed even for those who could not meet the 507-hour threshold. Additionally, support was made available for young professionals in the sector.

Third, the government issued guidelines and regulations to ensure the safety of both artists and audiences¹¹. These measures included capacity limits, social distancing rules, mask mandates, and enhanced sanitation protocols when the venues could re-open. The government periodically updated and adjusted the cultural events calendar to reflect changing health conditions. The cultural actors criticised the regulation as uncertain, with last-minute changes, and arbitrary.

Workforces:

The pandemic partial unemployment scheme (*chômage partiel*), combined with the existing unemployment compensation regime for performing arts workers (*intermittents du spectacle*), ensured the maintenance of incomes and employment conditions, regardless of whether workers could continue to work without an audience (as in the National Operas) or had to stop working. In contrast with many other countries, no massive dismissals, contracts termination or retraining of performing arts workers occurred thanks to this institutional support. This is true for artists, technicians and administrative workers alike¹²: they all could

rely on safety nets from the beginning of the pandemic. Even though workers were concerned about the long-term impacts of Covid-19 on their organisations and associated professional opportunities, they were less worried about the future than they might have been without these safety nets.

Nevertheless, our research suggests that working conditions and well-being at work deteriorated.¹³ The government's communications, in which culture was characterised as 'non-essential',¹⁴ combined with the back-and-forth regarding regulations to generate anxiety and anger. With workers employed in big organisations having to perform without an audience, or workers in smaller organisations unable to work at all, many reported a loss of meaning at work. This is associated with a rise of mental health issues such as depression and burnout. During the pandemic, artists and technicians went on strike and occupied theatres (e.g. the Théâtre de l'Odéon in Paris)^{15,16} to demand that the essential nature of culture be recognised and that theatres be reopened for audiences in a manner compatible with public health measures.

In addition, most performing arts organisations are not-for-profit organisations, and voluntary work is a very important resource for a lot of them. This is particularly the case for smaller organisations and/or temporary events, such as festivals.¹⁷ The volunteers could not work as usual because of the Covid-19 measures, but also because they often belong to vulnerable groups, such as older people. The volunteers experienced demotivation and a weakening of their social links.

Organisations:

Impacts on organisations varied, depending on their size:

Small structures experienced a massive disruption to their activities. This was especially true for those located outside the big urban areas, in more rural zones, or in the periphery, or for companies that were not attached to a physical venue. Most of them could not run at all and found themselves devoid of projects. While public financial support via the schemes described above ensured their short-term economic stability, they did not have the resources to invest in Covid-friendly activities, such as developing online performances. Organisations expressed important worries about their futures beyond their short-term economic survival. For a long time, despite their subsidies depending on the mission to democratise culture, they could not fulfil that mission by, e.g., performing in local schools, social and community centres or, more broadly, in the public space. Investing time, money, and energy in creating new productions was perceived as risky, since nothing could guarantee that they would be able to perform those shows.

Larger organisations, by contrast, continued to operate,¹⁸ often through online broadcasts, leading to a challenging work environment marked by physical and social discomfort. Social distancing rules and mask-wearing were experienced as difficult to observe, and often pointless, because of the centrality of the bodies and the inter-corporeality in performing arts (e.g. for dancing ballets companies). Paradoxically, the new digital activities led to an increase in the workload during lockdowns. Meanwhile, the ban on physical audiences had

wellbeing impacts for the workforce. Workers described the awkwardness of producing a musical performance with all musicians masked, in front of a huge, emptied opera hall, clapping at each other to avoid the uncomfortable silence. Yet, they expressed doubts about the post-pandemic period: how to encourage the audience to come back to theatre? How to deal strategically with the mix of activities that emerge during the COVID-19, i.e. is it relevant and realistic to maintain the online activities, or should the focus be on bringing back the audience to a face-to-face experience? How to avoid high levels of churn in the workforce and ensure the well-being of creative industries workers?

The digital offer during the pandemic was able to increase and diversify the access to culture. There remains a question about the social habit to frequent cultural venues, in a Bourdieusian perspective¹⁹ – rather than only the economic constraint (that still exists but is mitigated) and the physical possibility of accessing them. The latest barometer of French cultural practices regarding musical performances shows that the 15-24 age group is thinking of reducing its concert attendance. The main reasons are financial concerns (48%), a loss of desire to travel (30%) and fear of Covid (22%).²⁰ For people over 25, digital fatigue and a preference for outdoor activities are described.²¹ The interest in watching hours-long live performance on small computer or smartphone screens is limited. Yet, digital activities could be reinvented to meet the customers' needs, for instance in proposing the streaming in cinemas for a more immersive experience.

Creative Outputs and Cultural Value:

The population greatly appreciated the online activities some organisations were able to develop, and culture appeared to tackle some of the effects of social isolation during the lockdown periods. The democratisation of culture which is the core rationale of the French cultural exception model has been reinforced, and the concept of cultural rights has even spread.

Cultural workers responded to the clumsy governmental statements about culture being a “non-essential” as a scandal. They expressed their anger at the reopening of theatres not being a priority for the government despite its vaunted cultural exception policy. ‘Live performance would soon be dead performance’ has been a popular motto, with the strikes by cultural workers receiving a great deal of positive media coverage and popular support. The pandemic has therefore fuelled a broad public debate on the importance of culture in society.¹⁴

Case Study 1: The Opéra de Lyon

Following the conclusion of the lockdown, the national Opéra de Lyon rapidly resumed its activities, albeit under challenging circumstances. Artists and technicians returned to the stage, grappling with uncomfortable working conditions characterised by the use of masks and adherence to physical distancing measures. They knew they were preparing a performance that would likely never be staged with an audience in the venue. However, sustaining the activity maintained the project fundings and avoid putting workers into unemployment. It also involved having productions ready for when the audience could return. This manifests by an increased workload. Workers employed this practice for one, two, three, and finally four performances. Gradually, an awareness developed regarding the backlog of productions that would likely never truly reach the audience, given that programming has already been established for the next four years. Catching up was not an option.

The productions were filmed, which strongly questioned the meaning of the work: live performance was no longer live. At this stage, several technicians looked for more meaningful work in other sectors.

Case Study 2: Chamber music ensemble 'Bergamasque'

The Bergamasque chamber music ensemble is a small organisation that does not have regular public funding; it relies on fees paid by organisers when concerts are scheduled. With the lockdown, concerts were cancelled, and the artists couldn't come together for several months. This period was an opportunity to reconsider the meaning of their project. This ensemble, consisting of women aged 25 to 40, wanted to address the ecological sustainability of the touring logic. Together, they reimagined a mode of transportation that is more environmentally and family-friendly. They planned a tour starting from their homes on bicycles, performing concerts in locations within a distance of less than 20 km, all along the ViaRhona, a cycling path that connects Geneva to the Mediterranean via Lyon. They set off by bike with their children and instruments in the summer of 2023, playing in village squares and campsites. The initiative was a great success with the public, but the association still faces funding challenges to sustain the model. To date, they have not received any public subsidies to support the development of this *slow* culture, and fees for this type of event are very modest. Several eco-initiatives are in the process of forming a network to alert public authorities to the need to provide financial support for organisations that propose innovative projects, reach out to the public and place environmental issues at the heart of their creative work.²²

Industry Structures and Systems

Current preoccupations revolve around two pivotal issues. First, the reintegration of audiences into physical venues, complicated by shifts in audience behaviour such as a desire for outdoor activities amid rising telecommuting trends, and the overarching theme of ecology.

Second, the cultural sector grapples with the imperative of embracing ecological considerations, causing sustainable practices and eco-friendly initiatives.

These two issues can create tensions between the need to create revenues in the short term vs. the longer-term need to reinvent performing arts towards a slow, sustainable model. Cultural organisations have to navigate a complex landscape as they strive to engage audiences in a rapidly evolving socio-cultural and environmental context.

The maintenance of a strong, diverse cultural landscape is very important for French public authorities: even though we can speak about a two-track system between small and large cultural organisations, institutional support concerns both. More broadly, the exportation of culture as 'soft power' is not a major source of concern for policymakers, as French culture and cultural diplomacy are well established and rely notably on francophone countries and regions as well as French speakers abroad.

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6. Italy

Luca Antoniazzi

Introduction and methods

This report offers the findings of a review of literature produced in relation to the impact of the COVID-19 pandemic on the performing arts in Italy. The literature considered came from three major sources: (1) academic studies (including MA theses); (2) reports from research institutes or associations of professionals; and (3) specialised journalism or practitioners' interventions on periodicals or edited volumes.

The researcher acknowledges that the evidence, gathered through online searches and private/informal consultation with experts and colleagues, is fragmented and incomplete. Also, the sources used to compile the study have been gathered through several different methodologies, in different scientific fields, or relying on direct experience or anecdotes.

Pre-pandemic industry contexts

The cultural sector – the arts, heritage, and cultural industries – is both economically and symbolically important in Italy. Although cultural tourism takes the lion's share in terms of income and employment, the performing arts are also important, since as a labour-intensive cultural activity they employ c. 330,000 workers (defined here as those who paid their income taxes at least once a year). The performing arts accounted for between 0.6% and 1.4% of the total employment of the country.¹

Italy's cultural heritage, in particular, attracts millions of tourists yearly and is a major source of income for the Italian economy. Its richness has also become one of the distinctive features of national identity. Cultural tourism, and tourism *per se*, was perhaps the sector most impacted by pandemic-related restrictions to movement.²

In 2019, data on theatre attendance was positive, with year-on-year growth in ticket sales (2.81%), total box office earnings (6.98%) and sector turnover (5.75%).³ Longer-term, the performing arts sectors has since the end of the 2010s suffered from a “crisis of participation” (i.e., attendance),⁴ driven by a cost-of-living crisis and decreasing public subsidies for the arts (at the regional level especially). Public spending on culture in 2018 was low compared to other EU countries: between 2018 and 2021, Italy spent around 5 billion euros on culture – around 0.5% of its GDP – ranking at the bottom in the list of European countries (cultural services, broadcasting and other publishing services).⁵

Working conditions in the sector are characterized by low pay and unstable career paths.⁶ There are consistent regional differences in the national composition of the workforce: only 16% of the workforce come from the South of Italy and the islands.¹

Live Performing Arts during the COVID-19 Pandemic: Impacts and Responses Policy

Italy was the first European country to be impacted by COVID-19 at the beginning of 2020. Governmental intervention that affected the performing arts sector can be articulated in five phases:⁷

- Non-intervention: in January and February 2020, the government did not impose closures or substantial restrictions.
- DPCM (ministerial decree) 4 March 2020: complete interruption of indoor and outdoor art shows (10 March – 15 June).
- DPCM 11 June 2020: some outdoor and indoor shows were permitted if health and safety measures were respected (16 June – 24 October).
- DPCM 24 October 2020: due to a sharp increase of COVID infections, the government banned all performing arts shows (25 October 2020 – 26 March 2021).
- DPCM 2 March 2021: a slow but steady return to total reopening (27 March – present).

The impacts on the performing arts have been catastrophic. Between 2019 and 2021, the percentage of the Italian population that attended at least one outdoor show shrank by about 85%; theatre audiences decreased by c. 80%.⁴

Most interventions to sustain the sector came from the central government, primarily the MiBACT (Ministry of Cultural Activities, Heritage and Tourism), now Ministry of Culture (MiC). Regional governments prioritised their economic resources for the national health system. The national government's interventions can be categorized into emergency funds, benefits, tax relief, strengthening existing welfare instruments.⁸

The interventions were implemented through the following decrees:⁹

Cura Italia (Cure Italy), 17 March 2020:¹⁰ 25 billion euros in total, to address the pandemic. This included three interventions that matter to the performing arts:

- (1) €130 million of emergency funding (*Fondo emergenze spettacolo, cinema e audiovisivo - FES*) for cultural organizations and creative freelancers (art. 89-90).
- (2) €600 benefit for creative workers for March 2020 (art. 27).
- (3) Strengthening social welfare initiatives (*ammortizzatori sociali*) for intermittent workers, including performing arts professionals.

As for non-cultural organizations, the decree also mandated the suspension of collection of taxes, social security and welfare contributions and compulsory insurance gross premiums (these types of measures were activated throughout the COVID crisis).

Rilancio (Relaunch), 19 May 2020:¹¹ renewal of the €600/month benefit for creative workers; increase of the *FES* budget to €245 million; introduction of *FEI* emergency funding for cultural businesses and institutions (*Fondo per le emergenze delle imprese e delle istituzioni culturali*) with an additional €10 million allocated to the performing arts; provision of an 80% advance contribution to the theatre industry based on 2019 receipts through *FUS*, a national fund for the performing arts *FUS* (*Fondo unico per lo spettacolo*). The remaining 20% was provided based on the activities to keep professionals in work and to rearrange shows. There was also the introduction of a tax credit on venue rents and financial support for health and safety interventions.

Agosto (August), 14 August 2020:¹² increase of *FES* to €335 million and *FEI* to €235 million; introduction of a €1000 benefit for some intermittent and freelance cultural workers; extension of (cultural) unemployment benefit schemes to 18 weeks; introduction of new instruments, including tax relief for organisations re-opening after lockdown, to retain cultural jobs.

Ristori (Reliefs), 28 October 2020:¹³ increase of *FES* to €350 million plus €50 million for 2021, renewal of €1000 benefit for intermittent workers and freelancers.

Sostegni (Supports), 22 March 2021:¹⁴ a total of €1 bn for the cultural sector; reinforcement of existing support tools for performing arts (*FES*, *FEI*, benefits) with additional funds in May 2021 and March 2022.

Piano di Rinascita e Resilienza (*PNRR*, Renaissance and Resilience Plan), 12 July 2021:^{15,16} €4.2bn support for the cultural sector from the European Union,¹⁷ focusing on innovation and allocating €300 million for the green transition of theatre venues (Intervention 1.3).

The Italian Ministry of Culture reported that emergency resources, excluding *PNRR*, spent in 2020 and 2021 reached €4.6 bn, with approximately €424 million for performing arts workforce support and €664 million for institutions and freelancers. The distribution to the theatre sector is challenging to quantify precisely.

Workforce

In 2020 the workforce shrank by c. 21%, losing about 70,000 workers (from c. 331,000 in 2019).¹⁸ The impact on total paid work days and average income was milder, decreasing by about 8.6% and 1.8%, respectively. Gender disparities were significant in both remuneration and workforce composition. Male workers earned an average yearly income of €11,418 euros

for male workers, compared with €9,226 euros for female workers, representing a 19.2% average pay gap that widened with age. Despite this, women's incomes saw a slight increase of 0.2%, while men experienced an average decrease of -3.8%. Regional disparities were notable, workers in the north-west earning 35% more than the national average, whereas their counterparts in the south earned less than half of that.

In 2021 the number of workers in the performing arts increased substantially,¹⁹ reaching around 312,000 workers. However, average yearly income dropped by about €200 and the average number of workdays decreased by about 6%. Gender disparities persisted, with the gender pay gap rising from 19.2% to 21.4%. A significant portion of the 'new' workforce comprised younger individuals under 29, displacing older workers who had left the performing arts or found income from unemployment support schemes. Regional differences slightly increased, with workers in the north-west now earning 36% more than the national average.

The year 2022 was the year of the real recovery,²⁰ with indicators such as workforce units (+10,8%), average pay (+9%) and average days of work (+12,2%) showing positive trends. Gender disparities in workforce composition remained high, with 57.8% male representation, and the pay gap decreased to 19.3%, returning to 2020 levels.²⁰ Regional income disparities slightly narrowed, with northwestern workers earning 33% more than the national average.²⁰

Thus, while strong public interventions aided the recovery, many individuals in the performing arts, particularly those aged between 30 and 39, faced significant career and personal challenges, often transitioning into unemployment or moving on to pursue a career in a different sector. Professionals launched initiatives to highlight those struggles, with support from celebrities and organisations like the National Union of Theatre and Audiovisual Performers U.N.I.T.A. (*Unione Nazionale Interpreti Teatro e Audiovisivo*), which advocated for short-term economic support and changes in regulatory and policy frameworks.²¹

Organisations

During the pandemic, many theatre companies turned to digital and streaming options to navigate the uncertainty and reach at least part of their audiences.²² However, in May 2023, a significant Italian publicly-funded arts streaming initiative (<https://www.itsart.tv/>) was terminated by the new government elected at the end of 2022, marking a setback.^{23,24} Although other initiatives were implemented by theatre companies, the impact of streaming on the performing arts was not as significant as that experienced by the cinema sector. Despite both competing for people's leisure time, *outdoor* and *indoor* leisure time appear distinct, and it remains uncertain whether streaming will negatively affect public attendance at *outdoor* shows.²⁵

As restrictions eased, companies started to perform shows in a higher number of spaces and venues than before the pandemic, in approximately 14,000 spaces.²⁶ This increase may be

attributed to some venues (partially) closing or facing reopening challenges, prompting theatre companies to use alternative spaces for performances.

Despite government intervention, demand lags behind supply: enthusiasm for attending performing arts events is rebounding more slowly than is the availability of shows. Data shows that audience levels in 2022 were still behind 2019 levels (-21.4%), with drama theatre and opera experiencing particularly sluggish recoveries.²⁶

According to Italy's National Institute of Statistics ISTAT, only 12.1% of Italian adults attended a theatre show at least once in 2022, a 9% increase from 2021, but still c. 7% lower than 2021 (with only 7% of the population attending seven or more times). Women and adolescents were the most frequent attendees.²⁷ Cultural participation is marked by substantial regional disparities, with divides along the north-south axis and adult attendance in urban areas (18.4%) in 2022 far outpacing attendance in towns with fewer than 2,000 inhabitants in rural areas (7.5%).²⁷

Household spending on culture, including the performing arts, saw an uptick,^{26,27} with total expenditure on theatre shows in 2022 reaching approximately €385 million (-20% from 2019 but +191% compared to 2021).²⁶ However, despite this, the box office continues to struggle, leading to substantial increases in average tickets price to offset the loss in revenue. Consequently, fewer individuals are spending more money to attend shows. Given the high inflation and economic stagnation affecting the country, the situation appears unpromising. Concentration of consumption exacerbates inequalities of access, with women in lower social strata or southern regions most likely to be affected.²⁸

Creative Outputs and Cultural Value

Online performances garnered significant viewership during lockdowns, fostering public discussions about the relationship between culture and well-being in terms of creative activities and attendance.²⁹ In Lombardy, for example, the local Order of Psychologists promoted an online theatre programme called *Freud a teatro* (Freud at the theatre), adapting five important Freudian cases into scripts and then into online theatre performances. According to some commentators, these shows enabled audiences to establish a “specific relation between self and other, a particular way of being involved with something”.²²

The role of culture in enriching people's lives was reinvigorated by the pandemic and subsequent lockdowns. The increased consumption of audio-visual drama within homes underlined the significance of actors' contribution to people's lives, while the painful absence of live performing arts and their social dimension highlighted culture's role in fostering interpersonal connections and enriching society. Although the pandemic has put the performing arts into a state of economic crisis, it has also revitalised debates regarding the

sector's social impact, although these discussions are already waning as supply slowly recovers.

In 2021 the number of performing arts shows increased substantially compared to 2020, reaching approximately 1.7 million shows, marking a 28% increase (though still -60.5% compared to 2019).²⁶ The growth continued in 2022, with a more pronounced increase to 3 million shows – a 79.7% from to the previous year (29% of 2019 levels). Despite this growth, the performing arts, including theatres, demonstrated resilience in responding to the crisis but still faced challenges compared to 2019 figures.

The SIAE (Italian Society of Authors and Publishers) report on the performing arts categorises the sector into seven types: (1) prose or drama theatre, (2) opera, (3) ballet, (4) musicals, (5) puppet art, (6) circus, and (7) other (unclassifiable). Generally, there was a significant increase in the number of shows, totalling c. 125,000 in 2022, an 86% rise from 2021 but still 4.2% lower than in 2019.²⁶ Notably, drama theatre, circus and ballet experienced the quickest recovery, with ballet surpassing 2019 show numbers by +12.9% and the circus experiencing a marked surge, especially in southern Italy (+11.7%).²⁶ The regional distribution of performances revealed a disparity, with northern regions dominating, while southern regions lagged behind. Opera continues to struggle, with a show count still 23% lower than in 2019.²⁶ Southern regions like Puglia showed a 37% lower figure of opera visits per 1000 inhabitants than the national average, while Calabria exhibited a 92% lower figure.²⁶

Structures and systems

Many analysts and experts have pointed out the policy failure to implement necessary structural reforms.³⁰ If crises can be considered opportunities for the future, it appears that Italian governments have thus far missed the chance to bolster the cultural sector by making it more diverse and conducive to talent development.

A significant shortcoming for policymakers concerns the reform of intermittent workers' welfare, now renamed as '*indennità di discontinuità*' (benefits for intermittent cultural workers).³¹ Initially proposed by former Minister of Culture Dario Franceschini with the intention of emulating the French welfare system and *intermittents du spectacle* scheme, this reform aimed to address perceived shortcomings in existing support measures, which looked "a bit improvised".³² However, commentators and professional associations argue that the reform passed by the newly-elected right-wing government fails to deliver a meaningful structural change and suffers from serious flaws.³³

Despite the generous public funding allocated to address the crisis, the sector remains fragile and unequal, with no discernible long-term vision. Economic stagnation appears entrenched, casting a shadow over the sector's prospects. Only large well-funded institutions may possess the resources, energy and economic stability to formulate strategies beyond mere survival.

Case study: Il teatro di Babele (The Theatre of Babel)

This case study shows how and to what extent digital technology might help grass roots performing arts organizations.

Il teatro di Babele is a permanent school workshop available at the *Liceo Giuseppe Mazzini di Pavia* ('Giuseppe Mazzini' High School in Pavia), located in northern Italy, where students can learn and practice theatre acting. Established in 2013 through a collaboration between the school and the grassroots organization *Calypso – Il Teatro per il sociale* (Calypso – social theatre), the workshop faced significant challenges during the 2020 lockdown and subsequent pandemic-related safety regulations. Like many professional theatres, the organisers decided to move their activities online temporarily to sustain the workshop and maintain school community cohesion during lockdowns. As workshop organiser Marisa Forni explained, "it was the only place where they could meet, they could meet, discuss, talk about each other, say hi."³⁴

Daniele Canevari, a schoolteacher at the high school, documented this experience in a journal article.³⁴ He stressed both the challenges and real opportunities presented by digital technology for grassroots theatre organisations. While digital technology initially proved valuable during the pandemic's onset, Carnevari noted the rise of "digital fatigue,"³⁴ with students expressing a desire to move away from screen-based activities: "it is not what I enrolled for",³⁴ one student said.

The shift to digital platforms also altered the essence of theatre classes, diminishing the multisensory cognitive experience of sharing a physical space. Similar to professional shows, student-led workshops experienced a crisis, with not all students returning to re-enrol in the workshop after the pandemic (in some schools in the same city similar workshops were cancelled after the pandemic).³⁴ However, beyond the emergency, digital technology holds promise for effectively disseminating theatre culture through podcasts, video essays, blogs, and social media, fostering networks of fans and creatives.

Case study: Teatro Stabile Metastasio di Prato (Prato 'Metastasio' Resident Theatre)

This case study looks at the strategy of a permanent institution in the city of Prato (Tuscany): *Teatro Stabile Metastasio di Prato*, founded in 1830, then closed and reopened in 1964.³⁵

Following its closure in March 2020 due to the first ministerial decree, the theatre launched a social media campaign *#nontiscordardimé* (don't forget about me), encouraging individuals to share "a thought, a picture, a memory or a video" of the time spent at the theatre before the COVID-19 pandemic.³⁶ A second social media campaign, *#fotosintesculturale* (cultural photosynthesis), was launched in June 2020, accompanied by an online questionnaire to ask audiences questions about the future, listen to their voices and collect ideas.³⁷

When public spaces partially re-opened, the theatre focused on three activities across different spaces. Firstly, it undertook remodelling and innovation of its own spaces. As described in a manifesto presented on 22 July 2020, the organisation not only tried to follow the new safety guidelines but furthermore engaged in a critical rethinking of theatrical space.³⁸ Additionally, a working group (*gruppo di lavoro artistico*) comprising 14 individuals was established to new outreach strategies. Projects like *Posto di Blocco* or *MET Ragazzi* sought to bring performances outside of theatre space, where restrictions were less stringent. Local schools (*MET Ragazzi*) and outdoor spaces (*Posto di Blocco*) were used as spaces to put on small theatre shows involving few actors and technicians. These performances were further disseminated through a media strategy, with shows streamed on the theatre's YouTube channel and broadcast on local television channels.

An MA student at the University of Venice conducted audience research on the reception of these shows, presenting her findings in her thesis.³⁹ The audience reception of such shows was generally very positive: they found the shows engaging, and the communication of the theatre was effective. However, there was ambivalence regarding the willingness to pay for streamed or broadcast shows, with only 36.1% of respondents expressing strong willingness to pay.⁴⁰ Those willing to pay suggested that ticket prices for streams or broadcasts should be substantially lower than those for in-person shows.³⁹

Similar to the previous case study, this instance underscores the potential of technology to offer useful tools for boosting the value of the performing arts, especially in dissemination. Nevertheless, it emphasises the enduring importance of audience-performer interaction in shared physical spaces, highlighting the uniqueness and unrepeatability of live in-person experience. What this case study also shows is the importance of bringing the performing arts outside of institutionalised settings and engaging audiences in more diverse environments.

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7. Japan

Jonah Salz and Hiroto Kojima

Introduction and methods

This report contains the findings from a review and synthesis of literature produced primarily between 2020 – 2022 on the impacts of the COVID-19 pandemic for the live performing arts. Our review aims to provide a perspective that stresses the challenges to performing arts of the Covid-19 crisis in Japan, and how attempted solutions through funding, policies, surveys, and recommendations have often diverged from other G7 countries' approaches.

Our research brings together surveys and assessments conducted or co-sponsored by the Agency for Cultural Affairs (ACA, Bunka-chō),¹ in conjunction with two university whitepapers,^{2,3} and Arts and Culture Forum (AC-Forum),^{4,5} and Public Hall Association (Kobunkyo),⁶ and performers' rights organizations, including traditional advocacy group Geidankyo,^{7,8} and newly created JPASN (Japan Performing Arts Solidarity Group) of cross-genre theatrical producers and theatrical troupes.⁹ Comparative academic studies of COVID-19 measures in the arts in Europe and Asia, two online symposia,¹⁰ one an article,¹¹ and the International Theatre Institute's expert summaries by genre,¹² were particularly instructive. We supplement this with academic literature, much of which attempts to put COVID in historical context alongside plagues in Greek theatre and Artaud on the one hand, and in Japan the Spanish Flu epidemic, Kanto Great Earthquake (1923), Pacific war fire-bombing (1944), and Fukushima triple disaster (2011).^{13,14}

The report's perspective reflects the authors' backgrounds in performance studies and community art, primarily in the Kyoto region, augmented by the views of the many stakeholders we have consulted, including through two online multi-session "pandeminars".^{15,16}

Pre-pandemic context

Japan has a theatrical culture spanning 1200 years of folk, religious, and popular performing arts. Theatre is valued as both part of heritage and a critique of society. In 2019, 192 performing arts organizations reported 3,559,459 spectators for 12,285 performances.¹⁷

Tokyo, hosting nearly one third of Japan's population, is the theatrical capital, offering almost 200 professional performances on a typical Saturday in 2012.¹⁸ Large theatres feature musicals and historic dramas produced by entertainment corporations.^f Audiences are siloed, and private theatres expected to be self-reliant.

Across Japan's 47 prefectures, multi-purpose public halls (3,568), including dedicated performing arts stages (1,455), cater to local communities. Public theatres, including six National Theatres run by the Japan Arts Council (an arm of the Agency for Cultural Affairs

^f These include Tōhō and its affiliated Takarazuka Girls' Opera Company, Shochiku Kabuki theatres, the Shiki Theatre Company, the world's biggest producer of musicals.

(ACA)), coexist with private theatres. 1000-seat theatres coexist with smaller theatres sponsored by utility companies and commuter railway lines affiliated with department stores. Organisations such as the Japan Foundation, Asian Cultural Council, Tokyo, and Agency for Cultural Affairs facilitate collaborations with overseas partners through grants. International festivals, including those planned to complement the 2020 Tokyo Olympics and Paralympics, were designed to boost theatre and regional tourism.

Of Japan's numerous theatre associations and networks, three are particularly prominent: The Japan Council of Performers' Organizations (Geidankyō), the Japan Association of Public Cultural Facilities (Kumonkyō), and Forum for the Promotion of Cultural Arts (AC-Forum). The Actors' Union (Haiyū kyokai) and Geidankyō are considered conservative institutions, run by older, experienced professionals. Entrance to them is by sponsorship or recommendation, and previously many young artists and troupes did not see the benefit of joining.

Governmental support

Traditionally, elite arts in Japan have relied on imperial household and samurai patronage, while popular performing arts have been viewed as potential social disruptors.¹⁹ Since 2001, the Basic Act for the Promotion of Culture and Arts has broadly articulated state responsibilities for the arts.²⁰

The Agency for Culture Affairs (ACA), a branch of the Ministry of Education, Culture, Sports, Science and Technology (MEXT),²¹ uses its limited budget to protect, conserve, educate and transmit Japan's artistic heritage. It oversees the semi-autonomous Japan Arts Council, which manages national museums and theatres. Additional arts support is provided by the Creative Industry Department in the Ministry of Economy, Trade and Industry (METI), including the "Cool Japan" initiative of overseas entertainment distribution.²² Cultural disparities are addressed through the Japan Foundation for Regional Art-Activities (JAFFRA) within the Ministry of Internal Affairs and Communication.²³ The Japan Foundation, within the Ministry of Foreign Affairs, supports overseas tours and exchanges. There have been ongoing discussions about consolidating national cultural support through a single Arts and Culture Ministry, with the Tokyo Olympics 2020 seen as a potential critical juncture.¹¹

Philanthropy

Private philanthropy in Japan is relatively recent, focusing on symphonies and individual prizes rather than grassroots theatre. Crowdfunding for projects has gained popularity, and the hometown tax donation (*furusato nōzei*) system allows citizens to pay residential taxes which support local culture in a chosen region.²⁴ Despite tax incentives to support private donations of corporate or inheritance tax, the arts received only 5.2% of all such donations in 2023.

Policy and industry responses to COVID

Government restrictions

Japan's pandemic differed from other G7 countries in terms of the speed with which preventive measures were taken and a loss of life far lower than other G-7 countries²⁵⁻²⁶ despite having one of the world's least restrictive pandemic policies.²⁷

For the performing arts sector, February 23 government calls for public “self-restraint” (jishuku) on holding events caused confusion. Delays in issuing a nationwide Emergency Declaration until March 16th, two months after the first case was discovered, were widely seen as resulting from Prime Minister Abe Shinzo's reluctance to postpone for a year the heavily anticipated Tokyo 2020 Olympics.⁹ Following the eventual Declaration, guidance was given to avoid the ‘3Cs’ (Close contact, Closed spaces, Crowded places), resulting in closures of all public events. In the early stages of the pandemic, the revenue that would be lost due to cancelled and postponed performances or support for the creative workforce was not mentioned.

Economic support measures

The performing arts community and advocacy groups immediately campaigned for public recognition of the importance of the theatre industry and culture in society.¹¹ A bipartisan government taskforce reported on the impact of the pandemic on the entertainment sector in late March 2020, also commissioning guidelines for how to reduce risks at event spaces. The first supplementary budget in April contained provided only ¥2.1 billion for the implementation of COVID safety measures and ¥1.3 billion for the “Japan Live Yell Project”,²⁸ which encouraged people to share “the value of “live”.”^h However, the second budget revision in June included ACA's landmark “Emergency Comprehensive Support Package for Cultural and Artistic Activities”, an unexpectedly generous support monies (¥56 billion, approximately \$600 million), with three large projects: a general support fund, and two targeting groups small and large, for performances aimed at both regional and overseas distribution.^{2,3,29}

- The “Culture and Arts Sustaining Support Project” provided cancellation fees for performances and included provision for arts organisations, individuals including freelancers, and small theatre groups. This was the first time the government had subsidised individuals directly. Funding was provided for recording and digitising performances and for streaming. ACA was inundated with over 80,000 applications for these funds, of which 12,000 were either rejected or withdrawn. Nevertheless, this response, repeated in the 2021 budget was viewed positively by many in the sector.

⁹ The Olympics was declared postponed on March 24 2020, eventually held in the summer of 2021, during another Emergency Declaration, so without anticipated spectators).

^h the yen/UK pound exchange rate has fluctuated since 2020, ranging from 125-180 to the pound. 135 yen/pound reflect levels in spring 2020. See <https://www.poundsterlinglive.com/bank-of-england-spot/historical-spot-exchange-rates/gbp/GBP-to-JPY>

- Arts for the Future! (AFF!) attempted to address problems experienced by organisations with fewer than 20 members applying to the Continuity Support fund. It eventually included reimbursement of monies lost for cancelled performances, subsidies to commercial theatre for diminished profits. AFF2 continued as “the arts revival” fund in 2021, with a speedier and streamlined application process.³¹
- Arts Caravan,^{32,33} focused on two fronts: supporting “large-cast, high-quality,” theatre to increase demand, and supporting regional arts and performances until they could return to live audiences. It was intended to balance the disparity between arts offerings in major urban and regional areas and create digital content for overseas distribution.
- J-LODlive (Japan content Localization and Distribution live entertainment) was launched with a budget of ¥89 billion in April by METI to promote Japanese content abroad and promote tourism. Subsidies of up to half of production costs for live shows were given with the aim of archiving, live-streaming, and video distribution for overseas. METI collaborated on administering this with the advocacy group Geidankyō.

The performing arts were also supported through the Japan Foundation for Regional Art-Activities (JAFRA),²³ and the controversial “Go To” travel campaign, which also supported restaurant and event spending, by the Japan Tourist Association.

Workforce

The pandemic caused a catastrophic plunge in business revenues for theatre venues, groups, organizations and artists. Surveys highlighted basic workforce inequities in conditions and welfare, work and life balance. Roughly 60% of the 117 artists and staff who responded to a Geidankyō survey in 2022 indicated that their income in 2021 was less than 50% of the 2019 level; for half less than 20%.⁷ According to the JPASN’s “damage assessment” of individuals and groups, more than 60% were taking advantage of at least one of the ACA or MITI subsidy programs, as well as crowdfunding.⁹

Morale within the workforce was low, with reduced or cancelled performances leading to a loss of sense of purpose. Administrators and producers shifted activity to ensuring infection sanitation, reducing risks, funding applications, hybrid delivery, and streaming. There are anecdotal reports of burnout, frustration with various new funding sources, and for performers, depression with lack of live audiences or, when theatres opened again, inability to see expressions on the masked spectators in distanced, checkered seating. Young people hoping to go into the arts felt lost confidence during Covid. There has been increased discussion about contracts, harassment, mental health, and the safety net of social security for artists and workers in arts-related industries.^{29,34}

Freelancers

Conditions for freelancers and individual artists were particularly precarious, with many working on a gig job basis, and operating independently, outside formal organizations. Since under COVID, government funds were only available with proof of membership in a union or professional organization, many found themselves unable to access support.

The Sustaining fund, while generous at nearly half the ACA's annual budget, was challenging for those without a professional track record, and artists who lacked administrative "literacy". ACA found itself ill equipped to handle the scale of applications, screen individuals for the first time, or mentor them. Many artists belonging to small troupes felt resentful and frustrated by the process of doing their best to apply to this sudden new funding source, finding themselves rejected or unable to meet the qualifications needed.³⁰ Advocacy group JPASN's survey drew complaints of difficulties with the suddenly announced application procedures, lack of transparency of the process, delays in applications, late decisions, insufficient time to implement projects, and challenges with reporting.³⁵

Furthermore, the line is not easily drawn in Japan between amateurs and professionals.

Many part-time and freelance theatre workers experienced difficulties proving themselves professional, leading to new umbrella organizations and systems of qualification.³⁶ Later, the ACA's AFF2 attempted to rectify these problems with model applications and educational videos.

Surveys and data gathering

The ACA, accused of being out of touch with the reality of the theatre ecology, attempted to understand the performing arts Covid precarity with a slew of commissioned surveys of theatres and performers, as well as hold working groups and expert seminars. The pandemic led to the first ever survey of arts workers by the Ministry of Culture conducted in September-October 2020, with a report published in December 2020. Another survey on contractual relations in arts and cultural activities³⁷ was conducted in December 2021, leading to workshops and new laws protecting arts workers' rights.

Surveys and public debate led to renewed recognition of the need for persons trained in "art coordinator" or arts management who could serve as mediators between the government and individual artists. Beginning with Kyoto KACCO (See Case Study), counselling services on career, finances, harassment, and welfare were launched for artists in other cities and online.

Organisations

Revenue decline

Theater companies saw a 50% decrease in revenue in 2020 and 44% in 2021.⁸ While public theaters maintained full-time staff employees, they were forced to supplement the decline in revenues through general funds and public subsidies.³⁸

Organisational creativity

Risk-averse spectators would not venture to the theatres. However, large theatrical producers found creative ways to continue employing their contracted performers. Rotating casts and crews, using separate rehearsal rooms (Shiki), 4 hour-long programs per day rehearsed separately (Kabuki), eschewing live music (Takarazuka), or transferring a planned live idol stage show to a filmed hit movie (Shochiku).ⁱ Musical producers turned to virtual meetings with overseas designers, choreographers, and directors, but as Broadway musical rights for streamed performances without spectators were difficult to obtain, turned to original musicals.³⁹

Collaboration and advocacy

The crisis spurred organizations and individuals more used to competing for funding or siloed in different communities to connect to share information, gather and learn from data and collectively advocate for support from policymakers. It has thus been termed a “pivotal moment” for the sector.¹¹

Two new advocacy organisations were immediately formed. The Theatre Emergency Assistance Project was launched in May 2020 by the Japan Council of Theatre Companies (Gekidankyō), the Japan Directors Association, and the Japan Playwrights Association. The Japan Performing Arts Solidarity Network (JPASN) was established in May 2020 by 220 leading theater professionals and producers of prominent commercial theaters and production companies.⁴⁹ In addition to disseminating information and assisting theatre professionals in applying for grants, JPASN also served as the umbrella organization for the government-subsidized “Japanese Theater Mirai (Future) Project” aimed at expanding demand for the performing arts for schoolchildren and through regional tours.

Other smaller, artist-driven groups spearheaded campaigns and petitions, instigated policy discussions, provoked online discussions, carried out surveys and raised awareness of the crisis for the sector. WeNeedCulture in 2020 was an alliance of live houses, independent cinemas, and small theatres which developed crowdfunding and a campaign in support of local live venues. It successfully campaigned for the creation of a “Cultural Arts Reconstruction and Creation Fund which, after government consultation, was launched in collaboration with film and music organizations, receiving tax-free donations.⁴¹

Audiences

In 2019, there were 3,559,459 spectators for 12,285 performances, slightly fewer than 2018. In 2020 there were a mere 953,968 spectators for 5,953 performances. There was some rebound in 2021 (1,990,199 spectators for 9,268 performances). But while numbers of performances returned in 2022, 10,605, spectatorship was still low, 2,636,253.¹²

For the first time in 2021, The Theatre Yearbook added a streaming category for its survey and this showed that 8,461 videos were streamed a staggering 23,367,373 times (although these figures may include those just watching a few minutes or repeat viewings).¹⁷ In its 2022

ⁱ Orizawa Kabuki (滝沢歌舞伎), *ZERO 2020 The Movie*.

survey, online streaming figures (both live and recorded) was divided between fee-based (139, watched 697,119 times) and free (70, watched 462,000 times) for nearly half of live viewership.¹⁷

The digital pivot

During COVID there was a sharp increase in interest from both viewers and producers in video streaming and distribution. Digital archiving began to be considered in earnest. It also heightened a sense that Japan is lagging behind in recording technology and rights handling know-how and the importance of archives as providing a historical record for precarious traditional arts, and potential source of future revenues.

Government-funded projects encouraged digital archives as a kind of “heritage insurance” for live theatre events. Individual theatre groups began to put their archived or non-spectator performances online for free or requesting a donation or charging.⁴² Traditional theatre performing troupes and individuals held online salons, lectures, and performances without an audience, and some delivered training. Noteworthy among the many new or newly-energised channels were those originating in live concert streaming and those run by various online ticket agencies, and Theatre for All, a platform for multi-lingual titling and accessibility, for those with disabilities, regional access, or overseas.

2020 saw the launch of the "Emergency Performing Arts Archives + Digital Theatre Support Project" (Eternal Performing Arts Archives and Digital Theatre, EPAD). This aims to promote digital archiving, provide expert support in processing distribution rights and preserve traditional performing arts as cultural heritage. It is expected to contribute important infrastructure for international branding and the development of performing arts in Japan in the future.⁴³

Case Study 1: Kyoto City's Response: surveys, funding, counselling

Kyoto, Japan's 9th largest city with 1.5 million is known as “Japan's cultural hometown.” It hosts numerous arts projects such as the Kyoto Art Center (KAC), and Kyoto Experiment performance festival. In April 2020, the city launched creative support measures for artistic activities, preceding national efforts.⁴⁴ These measures, including financial subsidies and new projects by the Kyoto Arts Foundation, were tailored based on surveys and consultations with arts stakeholders.

About a month after the first Emergency Declaration, Kyoto announced the "Kyoto City Emergency Support Fund for Cultural and Artistic Activities". In May 2020, a survey on the status of activities of artists and others showed their needs for resuming and sustaining their activities.⁴⁵ In July, two new support measures were launched: a "Challenge Support Grant" for artists and a "Grant for Continuing Support of Presentation and Appreciation Facilities" for hall managers. To fund these initiatives, a matching grant system leveraging tax-deductible crowdfunding was adopted. An October grant launch for “The Resumption of activities amid the corona Disaster” helped to cover part of the venue costs and expenses for infectious disease control.

In October 2021, "Arts Aid Kyoto" (Kyoto City Collaborative and Cooperative Culture and Arts Support Program) began operations, focusing on tax-deductible private donations supporting cultural activities (70%) and the city's cultural policy (30%).⁴⁶ "Kyoto Art Donation," accepted donations to culture and the arts, supported the matching of art activities with corporate activities, and provided a consultation service for artists moving to Kyoto.⁴⁷

The Kyoto City Arts and Culture Consultation Office (KACCO) opened in the Kyoto Art Center in July 2020,⁴⁸ offering comprehensive support to artists and managers seeking grants and subsidies. KACCO offers advice on online distribution, contracts and copyrights, mental health and harassment, and more. Covid thus spurred Kyoto City to create systems for donation, networking, and counselling which remain successful and are copied elsewhere.

Case Study 2: Stages Beyond Borders—Selection of Japanese Performance

In February 2021, the Japan Foundation began streaming multi-lingual subtitled videos of dance, music, and theatre in a new program of high-quality documentary films and live recordings under the banner of *Stages Beyond Borders—Selection of Japanese Performance*. Expert advisors supervised by NHK, the public broadcaster, oversaw the production of high-quality short documentary videos with leading traditional and folk art performers, including the rarely promoted Ryukyū buyō (Okinawan dance) and Ainu dance. There was also a widely-viewed series of short, avant-garde videos in the "Noh Climax" series directed by photographer/architect Sugimoto Hiroshi.

In addition, a rotating series of full, subtitled versions of modern theatre groups was set up, including Suzuki Tadashi's SCOT Company and Shizuoka's SPAC collaborations with French director-playwright Oliver Pym, butoh legends Dai Rakuda Kan and multi-media pioneers DumbType. These videos were viewed by tens of thousands of people, presumably mostly from overseas (many had no Japanese titles). A boon to classroom teachers, they were intended to kindle interest in Japanese theatre abroad for potential future tours. As of January 2024, 117 videos have been released, watched by over 18,000,000 viewers worldwide. Although most are for viewing for limited periods, 31 have been released to the E-PAD project for distribution, with a further 49 planned.⁴⁹

Structures and systems

The unprecedented surveys of performers, theatres, and arts workers have led to a range of proactive measures to firm the infrastructure. The Corona disaster revealed the fragility of the foundations of the arts and culture sector in Japan, the inadequate understanding of the sector as an industry and the resulting ambiguity in the social positioning of artists and arts and cultural organizations.

The recognition of the structures by which freelancers and small and medium-sized enterprises support the cultural industry has led to increased discussion about social security

for artists and workers in arts-related industries, and surveys of the actual situation are underway.

The basic budget for the ACA remains the same as it was pre-Covid, around ¥100 billion. However special budgets were added in 2023 for performing arts, including music and theatre, in 2024 on the 10th anniversary of the law strengthening the infrastructure and Japanese “brand”. Learning from its Covid experience, ACA revised the “five year plan” regarding theatres and concert halls (2023-2027). In 2024, these were continued and additionally expert training programs, seminars, and workshops on contracts, harassment, and mental care were held.³⁴

The reports and academic studies use a comparative approach, noting Japan’s poor per capita spending on arts through the ACA during the Covid-19 crisis compared unfavorably to G-7 countries or neighbor Korea. However, given Japan’s decades-long economic doldrums, the low yen, increased threat from China, and historic ambivalence towards government funding, some view the unprecedented public debate in the media about the value of art as a public good in political discourse and public debate to be an enduring systemic change.¹¹

Digital pivot

As more streaming occurred, there was competition for improved practice: actors holding cameras, spectators choosing camera angles, alternative versions, and use of projections of CG images with live actors, already advanced with 2.5 musicals.⁵⁰ VIPO, the “Visual Industry Promotion Organization”, is now charged with strengthening Japan’s content industry.⁵¹ Seeing the fragility of transient performing arts has led to a recognition of the importance of archives and a growth in video streaming sites giving overseas viewers access to dance, music and theatre. The amalgamation of previously separate genres in what Japanese call “mediamix” now includes theatre as potential digital content for overseas consumption. With METI’s budget far greater than ACA’s, this appears to be a permanent contribution to improving the “Japanese brand”.⁵²

Youth

Getting young people to live theatre has been a recurring issue. The lower yen, rising costs of fuel and wood products, and royalties for Broadway musicals have driven ticket prices for musicals up 7% in one year.⁵³ Performers and producers worry about how to renew the habit of live theatre-going that high school students had on group excursions or school culture days before the two-year pandemic hiatus. Japanese traditional performances are in decline, with novel productions including popular anime and manga characters perhaps needed to attract younger audiences.⁵⁴

International market

Ironically, the closing of borders created a greater recognition of the importance of and potential for international collaborations, especially within Asia.⁵⁵ Significantly, the ACA whitepapers and cultural policy symposium devised an assessment of the Japanese arts structures through comparative analyses of Asian and Euro-American examples.^{2,3} Media attention from overseas and domestically spurred a steady stream of entertainment industry scandals. Meanwhile, amid a shrinking yen, which make exports less profitable, and greying and shrinking population, Japan seeks better working conditions for foreign laborers.

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