

Pandemic Preparedness in the Live Performing Arts: Lessons to Learn from COVID-19

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March 2024

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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 have been peer reviewed and 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.

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Introduction

This report summarises research and presents key findings and recommendations from the British Academy-funded Pandemic Preparedness: Lessons to Learn from Covid-19 across the G7 project. Between April 2023 - January 2024, a UK-led research team with Co-Investigators in the USA, Canada and Germany and Research Associates in France, Italy and Japan examined the lessons learned from the responses of the live performing arts sector and governments to COVID-19 in the G7 countries. We focused our attention on policy interventions by governments and funders alongside the individual responses by workers in the live performing arts as well as organisations and their audiences. We further considered the impact of the pandemic on digital modes of working and disseminating creative content; how the pandemic affected communities, places and how 'cultural value' is understood; and what the pandemic revealed about systems and structures in the sector. The aim was to support sector preparedness for future crises, whether caused by new pandemics, climate-related disasters, demographic changes, economic pressures or the impacts on the live performing arts of national and international politics. This summary is written for readers in the UK and stresses points of convergence and lessons that can be learned from best practice elsewhere.

Full and detailed reports for each country, including all references, are available at [Pandemic Preparedness | Societies and Cultures Institute | University of Exeter \(http://tinyurl.com/33dkaf6u\)](http://tinyurl.com/33dkaf6u). This summary report only includes references to support key statements regarding divergences between countries' approaches to the pandemic which have a direct bearing on our recommendations.

Key findings

- 1. There was insufficient understanding of the ecosystem nature of the industry and the live performing arts often lacked a representative collective voice.** An example of good practice that tackles this issue is the *Neustart Kultur* scheme in **Germany**, which was built on close engagement between policymakers and the sector. In the state of Hesse, too, *Masterplan Kultur*, an ecosystem mapping exercise, has led to simplified access to state funding. In the **UK**'s devolved regions, Manchester and Sheffield Councils' targeted support was founded on detailed local understanding and consultation, as well as existing investment in infrastructure.
- 2. Where financial support measures targeted organisations and their buildings, there is little evidence of 'trickle down' to the freelance creative workforce.** There are, however, examples of effective support for the workforce: In **France**, the *intermittents du spectacle* scheme left workers more financially resilient, and **Germany's** *Neustart Kultur* scheme mixed social assistance and project funding; it also responded to changing needs.
- 3. Workforce mental health suffered where public discourse or policies appeared to undermine the viability or meaningfulness of cultural activity.** However, in **Canada** and **Germany**, where there were efforts to enshrine culture in legislation, artists felt better supported. In **Germany**, there is some evidence that creative workers' wellbeing improved during the pandemic.
- 4. The pandemic exacerbated existing structural disadvantages in the workforce and highlighted a lack of visibility in the data for disadvantaged individuals and groups.** In **Canada**, however, meaningful involvement of disabled artists in ensuring digital accessibility proved helpful. In the **USA, Canada** and the **UK**, structural rethinks have been slowed by economic pressures and the move of disadvantaged workers from the sector.
- 5. Pandemic workforce shifts have created significant skills gaps, including moves by technical workers to film and television.** These impacts are exacerbated by lack of access for non-unionised freelance workers to professional development opportunities and human resources.
- 6. Government aid was critical to organisational survival during the pandemic but eligibility criteria meant some organisations were not easily able to access sector-specific government funding.** **Germany** is an exception: unprecedented levels of funding were provided to a range of organisations, stimulating collaborative opportunities.
- 7. Audience behaviour has shifted. There are calls to re-examine programme development and marketing.** **Germany's** *Neustart Kultur* scheme, which includes an audience research strand, is an example of a rapid policy response to this problem.
- 8. Locally well-networked organisations were better able to support communities and public health activity.** In the **UK**, providing support for local communities during the pandemic brought wellbeing benefits for artists and audiences alike, but in both the **UK** and **Canada** artists experienced additional emotional labour and burden as a result.
- 9. The pivot to digital was crucial for organisational survival, and for provision of support for workforce and audiences. It was exclusionary where access or capacity was lacking.** Previously invested organisations fared better. Responses to this issue took a range of forms: In **Germany**, the role of *Resilienzmanager* ('resilience manager') helps organisations integrate digital systems and ensure staff have the right skill sets. In **Canada**, a targeted access programme sought to counter inequities for Indigenous communities. In the **UK**, however, some disadvantaged groups are experiencing renewed exclusion after the 'snap-back' to in-person live performance.

The Project: Aims, Methods, Objective

Research teams in the UK, Canada, USA and Germany 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 and excluding music). The aim was to draw evidence-based conclusions that would help the UK sector improve preparedness for future crises. This process was guided by themes identified in consultation with policy and industry stakeholders and academic partners. Across the teams we reviewed the full text of 356 sources, of which the vast majority were focused on theatre. Additional non-systematic literature reviews for France, Italy and Japan were compiled by our Research Associates.

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. Because of the crisis context in which this literature was produced that led to studies of variable quality, scope, and biases, we additionally carried out stakeholder interviews and discussions with our Lived Experience Panel representing diverse industry practitioners in the UK, USA, Canada and Germany, aiming to provide an up-to-date comprehensive perspective that is cautious about potential biases.

This summary report concentrates on the UK, USA, Canada and Germany and includes additional information about Japan, France and Italy where relevant. It presents key comparative findings regarding workforces, organisations, systems and structures, creative outputs and cultural value across the G7. Recommendations were developed through an iterative knowledge exchange process involving industry stakeholders and academic partners, and are based on the literature we reviewed. This report therefore offers evidence-based recommendations for UK governments, funders, unions and sector organisations to support sector resilience to future severe disruptions caused by public health crises, climate-related disasters or other factors.

Policy contexts

In this section we summarise cultural policy differences, priorities, values and sector infrastructure. For more information, see the 'Pre-pandemic Context and Background' sections in our full report at Pandemic Preparedness | Societies and Cultures Institute | University of Exeter (<http://tinyurl.com/33dkaf6u>).

Across the G7, the theatre sector was grappling with challenges in the run-up to the pandemic, but the contribution of theatre to the economy was recognised. Audience demographics generally skewed towards older audiences, but subscription models were waning. In North America and Europe, the overreliance of the sector on precarious freelance workers on low overall pay and the lack of representation by disadvantaged groups in leadership positions were causing concern. Boundaries between commercial and not-for-profit or subsidised theatres were and remain porous, with workers and shows moving between them. Only the USA did (and still does) not have a significant state-subsidised creative sector.

In the UK, responsibility for culture is devolved to notionally arm's-length national arts councils (Arts Council England, Arts Council of Wales, Creative Scotland, Arts Council of Northern Ireland), with additional funding by local governments. Post-2010 'austerity' policies decreased government support for the subsidised sector and resulted in increased reliance on earned and contributed income, and Brexit was posing further challenges for international touring. Common funding and project-focused production models led to freelancers lacking visibility. In England, the creative sector was concentrated in London and the South-East, with a strong commercial sector concentrated in the West End. At the start of 2020, ACE's 10-year 'Let's Create' strategy was partly seeking to rectify this and promoting 'creativity for all'.

In Germany, artistic freedom is enshrined in law, protecting artists from regular attacks by right-wing groups; the inclusion of culture in the Federal Republic's Basic Law is a subject of ongoing debate. Cultural funding is mainly devolved to federal states and local governments and distributed by the Bundesverband Freie Darstellende Künste, the Fonds Darstellende Künste, the Bündnis Internationaler Produktionshäuser and the Dachverband Tanz. Berlin has a unique system of national and federal funding. In the run-up to the pandemic, there were concerns regarding growing shortages in skilled sector workers and sexual harassment.

In Canada, cultural funding is distributed among federal, provincial/territorial, and municipal governments, and arm's-length arts councils. Sectoral challenges vary between regions and territories: while Québec and the Atlantic provinces emphasise the government's role in promoting cultural identity and language, provinces like British Columbia view culture primarily as an economic and community resource. In Canada's northern territories, educational and cultural initiatives aim at safeguarding and promoting Indigenous languages and traditions. The Canada Council for the Arts, a Crown corporation, serves as Canada's national arts funder. It has a mandate to foster and promote the study, enjoyment, and production of works in the arts. Funders are focused on tackling the legacy of colonial violence and issues of equity, diversity and inclusion.

In the USA, the sector is divided into commercial theatre (concentrated in New York's Broadway), a tier of 79 theatres represented by the League of Resident Theatres (LORT), and hundreds of smaller non-profit companies across the country, who were in decline because of audience and financial pressures. Federal government support was low. This was long mitigated by a strong tradition of philanthropic support, but corporate donations were increasingly transactional and in decline. There were increasing labour costs and demands for improved working conditions; overall, the sector was economically precarious.

In France, significant growth in the sector between 2000 and 2017 was due to ambitious centralised cultural policies aimed at the democratisation of culture and the use of cultural diplomacy. The promotion of the French ‘cultural exception’ (*exception culturelle*) involved substantial financial support for organisations, along with an unemployment scheme for performing arts workers (*intermittents du spectacle*) that mitigates against precarity. However, theatres were inadequately supported by corporate sponsors, while cost of living pressures and fear of terrorism affected audience attendance, especially for smaller organisations, despite the implementation of Pass Culture, a scheme subsidising tickets for young cultural consumers.

In Italy, culture, and in particular cultural heritage, is highly valued in public discourse and theatre attendance and sector turnover were rising in 2019 despite a slight decline in the number of shows. Longer-term, however, in the wake of the financial crisis and related decreases in public subsidies for the arts, especially at the regional level, theatre audiences had been in decline since the start of the decade. Public spending on culture between 2018 and 2021 was low in comparison with other European countries. There were marked regional differences, with only 16% of the creative workforce coming from the South of Italy and the Islands.

In Japan, the theatre sector is comparatively small. Commercial genres such as kabuki, Takarazuka Girls’ Opera, and musicals thrived with multi-generational, mostly female audiences, while traditional arts appealed to mostly elderly audiences. Limited-run star-led productions of plays and adaptations of manga and anime drew young audiences. There is no substantial funding for theatre, and arts funding in the 47 prefectures varies greatly. The decline in union-organised group tours to plays, and limited spectatorship outside Tokyo and Osaka, have led to railway companies and department stores sponsoring private theatres. Shortages of professional, permanent programming and technical staff cause problems.

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

We now report our findings from the syntheses of the literature and stakeholder discussions and interviews. The overarching themes were arrived at through consultation with stakeholders throughout the research process. We first explore how policymakers and sector leaders responded to the crisis. We then examine impacts on the workforce, organisations and on artistic outputs and conceptions of cultural value and finish with a consideration of systemic or structural issues. Readers should refer to the relevant individual country reports for all detail and additional supporting references: [Pandemic Preparedness | Societies and Cultures Institute | University of Exeter](#) (<http://tinyurl.com/33dkaf6u>).

1. Policy and sector responses

The responses of policymakers and the sector to the dramatic impacts of the pandemic and measures to mitigate its impact varied according to the size, complexity and existing structure of the sector in each country.

The most widespread forms of policy response were **economic, many of these unprecedented in scale and speed of administration**. They included:

- **grants or loans** to organisations and individuals (mostly disbursed via arts funding bodies)
- **income support** for workers in continued employment (often directly from governments and not sector-specific)
- **ad hoc hardship payments** (funders, organisations and philanthropy)
- **targeted business tax relief** (governments)

Most countries focused their financial measures on organisations and their buildings (e.g., the **USA's** Shuttered Venue Operators Grant or the **UK's** Culture Recovery Fund which included the heritage sector). Countries struggled to meet the financial needs of freelance workers, who fell through the gaps of funding schemes like the **UK's** Job Retention Scheme (JRS) or Self-Employment Income Support Scheme (SEISS), which were principally designed for workers on longer-term contracts or targeted at those earning more than half their income from self-employment.

France is the exception due to its pre-existing *intermittents du spectacle* social security scheme for creative workers which operated as a financial safety net for freelancers and which was, during the pandemic, augmented with a partial unemployment scheme (*chômage partiel*) that supported sector employees while organisations were supported by a cultural emergency fund (*Fonds d'Urgence pour le Spectacle*).^{1,2}

Italy, which was the first G7 country to be severely affected by COVID-19, set up a range of emergency funds for organisations that were topped up in the course of 2020-22 and augmented by EU funding to support venues towards a green transition. In 2020, Italy also supported creative freelancers with time-limited benefits. This evolved into the *indennità di discontinuità* scheme in 2023,³ which attempted a reform of social security for creative freelancers following the French *intermittents du spectacle* model.

Canada's response was speedy, with a first tranche of *COVID-19 Emergency Support Fund for Cultural, Heritage and Sport Organisations* announced on 17 April 2020. *Digital Now* grants incentivised digital innovation during the pandemic and its *Recovery Fund for Arts, Culture, Heritage, and Sport Sectors, Reopening Fund*, and *Canada Performing Arts Workers Resilience Fund*, launched in 2022, have supported recovery.

Japan's revised budget of May 2020 provided unprecedented support not only for individuals and organizations, but for streaming and online platforms.

Due to the disparate sources of economic support and different sector boundaries exact figures for each country's economic support for live dramatic performance are impossible to establish, however it is clear that **Germany**, with €14.5bn collective spending on culture,⁴ provided the most generous *per capita* response. First funds there were spent in May 2020, before the implementation of the flagship scheme *Neustart Kultur*,⁵ which was developed in dialogue with sector stakeholders (September 2020-June 2023). The scheme mixed social assistance and funding and, from 2021 onwards, included "Hardship-Aid" funding for freelancers and changes to the conditions of the Artists' Social Security Fund (*Künstlersozialkasse*). This tightened the safety net for artists. Like the UK's Culture Recovery Fund, the *Neustart Kultur* scheme was well received overall, providing unprecedented support and confidence-boost for the sector. Nevertheless, the Federal Court of Auditors has since deemed it inadequate to prepare the cultural industry for future crises because of its overly complex structure, flawed implementation and insufficient matching of funding to actual needs.⁶

Other policy responses included **funders'** extension of deadlines, simplified application processes, and adjusted expectations about funded activities. There were changes to **local and regional governments'** approaches to outdoor events and in some places, **health providers and public health bodies** worked with organisations to support community health and wellbeing and participate in public health campaigns. **Creative sector workers** increasingly took up opportunities for training and learning new skills ('upskilling') and organised into formal and informal networks, often online.

Unions and professional associations took on a stronger advocacy role on behalf of their members, while in the **USA**, lobbying to extend rescue packages to the not-for-profit sector reflected a lack of recognition of this sector's role in the industry ecosystem. While in **Japan**, lobbying led to a new programme for regional outreach that took metropolitan theatre companies into regional public halls, in **Germany**, advocacy for the arts led to the inclusion of culture as a state objective in the 2021 Coalition agreement.^{7,8}

2. Workforces

Shuttered venues and social distancing measures led to significant job and income losses in the G7 creative sectors. In all countries that have a live performing arts workforce that is subdivided into long-term employed workers and a majority of the workforce composed of freelancers (termed 'contract workers' in the USA), mitigation measures that focused on the survival of organisations in a 'trickle-down' economic model resulted in unequal impacts on the workforce.

Employed and freelance workers

Many of those remaining in employment (workers with key organisational and administrative roles or those who were part of the pivot to digital performance), had to fill additional roles that required training or 'upskilling' in digital, technical, fundraising and management jobs. They also often took on new roles as public health workers who educated audiences, helped enforce regulations, communicated guidelines and did community work, including in food banks/ community kitchens.

While work pressures increased, leading to burnout for some, employed workers still fared significantly better than their precarious freelance counterparts. Income supplements were a lifeline for those who could access them despite difficulties navigating sometimes confusing funding schemes, multiple un-coordinated and mutually exclusive sources of support, and overly complex application processes. The “Masterplan Kultur” launched by Hesse (**Germany**) in 2023 was co-created with industry representatives and is an example of good practice in simplifying access to state funding following a mapping exercise of the state’s cultural landscape.⁹ But during 2020-21, many freelancers in Germany and throughout the G7 fell through the cracks of systems and support structures that failed to recognise the extent to which the performing arts workforce is constituted of workers who have ‘portfolio careers’ that combine short-term contracts within the sector with ‘gig economy’ and part-time jobs outside it. **Canada** is notable for changing the eligibility of some public funds in response to advocacy from arts workers.

Existing structural disadvantage

In the **UK, USA and Canada**, the pandemic exacerbated pre-existing structural disadvantages affecting Black, Indigenous or otherwise racialised artists; women or younger professionals (Canada, UK); working-class artists, parents, carers and those living with long-term illness or a disability (UK). In **Germany**, older freelancers and women were disproportionately affected, while in **Italy**, those aged between 30 and 39 were most likely to drop out of the sector workforce. In Italy, too, the gender pay gap in the sector increased during the pandemic, as did pre-existing regional differences between the wealthier north and the poorer south.

Everywhere, many unemployed artists and technicians, especially those left out of the sector’s early pivot to digital performance, sought employment outside the sector. With many experienced workers leaving the sector permanently, there are now widespread skill gaps for technical, creative producing and middle-management jobs as well as for the creation of digital experiences and their marketing. There were also widespread mental health impacts, with high reported levels of stress, anxiety, self-exploitative behaviours (unpaid and ‘invisible’ emotional labour) and burnout by workers determined to remain in the sector, and expressions of anger and resentment towards organisations and governments.

These impacts were exacerbated by lack of access of non-unionised freelance workers to professional development opportunities and visibility within human resources, and by policies that ignored the cultural value of live performing arts (see also ‘Communities, Places and Cultural Value’ below). Notably, in **France**, despite the relative financial security for artists employed by large organisations and the additional financial safety net afforded by the partial unemployment scheme, the workforce’s wellbeing was negatively affected by the fact that the productions they mounted would never be shown to a live audience. The French government’s characterisation of culture as ‘non-essential’, combined with uncertainty regarding pandemic regulations, caused anxiety and anger.¹⁰ In the **UK**, HM Treasury rhetoric that appeared to question the ‘viability’ of artistic professions, alongside policy responses that privileged heritage buildings and ‘crown jewel’ organisations above the creative workforce, proved similarly damaging. Workers reported a sense of loss of purpose and personal and professional identity that was compounded by their ‘invisibility’ in official sector data and public discourses.^{11,12}

By contrast, in **Germany**, where financial support for the sector and resourcing of R&D projects during venue closures was accompanied by attempts to enshrine the right to culture in the coalition agreement and state constitutions, wellbeing for creative workers improved,¹³ but there was some criticism of aspects of *Neustart Kultur*. From 2024, unemployment insurance for artists and a minimum wage are anchored in state legislation. In **Canada**, too, measures to keep creative workers employed were prioritised and there has been significant sector lobbying

for universal basic income (UBI).¹⁴ Attempts in 2021 to legislate to highlight the importance of arts, culture and heritage to societal health and prosperity and strengthen artists' labour rights have led to recommendations for a comprehensive review of relevant legislation.¹⁵ In both countries, sector representatives advocate for improved working and living conditions for artists that are based on a better understanding of creative processes and artists' life cycles. In the **UK** and **USA**, too, there are calls from within the sector for better data to be produced to understand the creative workforce and its needs. In **Japan** an uptick in memberships of recognised umbrella organisations along with the emergency of new advocacy organisations, networks and counselling services for freelancers has led to ongoing surveys and greater workforce support.

3. Organisations

Across all G7 countries in 2020, performing arts organisations experienced immediate financial impacts from the pandemic and its associated restrictions and many pivoted to alternative modes of delivery, whether through digital, outdoors or other 'COVID-safe' means of production.

Funding, support and restrictions

Government aid was widely seen as critical to organisational survival. There was widespread take-up of emergency support funding for the arts in the countries where and when it was available, but inequalities were reported, often resulting from gaps and imbalances in economic and funding structures in place prior to the pandemic. For example, in **Canada** initial emergency relief was largely distributed to organisations already in receipt of grant funding, meaning that some smaller and non-core-funded organisations may have suffered. In the **UK** and **Canada** eligibility criteria meant that commercial organisations were not easily able to access sector-specific government funding primarily designed for the subsidised sector. Short term or project-based funding created on 'innovation' models was criticised in Canada as not providing the stability organisations needed for survival. In **Germany**, by contrast, unprecedented levels of funding were made available to small independent or privately-run arts organisations as well as to previously well-funded large state sponsored institutions, stimulating opportunities for them to produce work collectively. In both the **UK** and **Canada** organisations reported significant workload resulting from the need for continued grant application and reporting.

Organisations experienced issues with the way in which public health restrictions were communicated. In the **UK** at the start of the pandemic, many struggled with being officially open while audiences were advised not to attend and government communication continued to be widely described as confusing, particularly where it differed regionally. In **Canada** each province/territory administered restrictions individually, affecting re-opening schedules and processes. In the **UK** the 'Tier' system led to differential impacts for organisations across the regions. In the **USA** there were also wide disparities between states and cities in terms of when venues were allowed to re-open, and in **Japan**, where pandemic responses were determined by prefectural governors, measures varied by region and between commercial, public, and small theatre venues.

Buildings remained closed for long stretches. In **Canada**, there were significant difficulties and increased financial burden associated with organisations' maintenance of physical infrastructure both during and after the pandemic. Similar issues, exacerbated by inflation, were also raised during stakeholder interviews in the **UK**. In **Italy**, the struggles of some venues to re-open led to companies moving to new spaces and venues once restrictions eased, with an overall rise in the number of performance spaces compared to 2019 figures.

Relationships with the workforce

While there were redundancies, income support measures offered by governments in the **UK** and **Canada** to employed workers meant that most were able to support these staff in the early stages. However, as pandemic conditions continued, the ability to either retain (UK) or continue employing staff (USA) became a growing issue. Relationships with contracted or freelance workers were difficult where they experienced inequity of access to financial and other support. Remote and flexible working was introduced for administrative and managerial staff. In the **UK**, there were reported difficulties resulting from weak capacity in key areas such as human resources.¹⁶

As the crisis continued, organisations and their leaders expressed increasing concerns for staff mental health and wellbeing. There are signs of continuing impacts from and responses to this. In the **UK** organisational shifts include greater recognition and embedding of freelancers within workforce and business processes, support for caring and compassionate approaches to leadership, and collective or shared leadership models.^{16,17} In **Canada**, discussions about precarity, labour and mental health further led to examination of the role of power and privilege in organisational structures.¹⁸ Similarly, in the **USA** the *We See You White American Theater* (WSYWAT) manifesto sought to respond to long-term racial inequities with respect to working and artistic conditions and practices. Shifts of this kind have financial implications, exemplified in the **USA** where organisations are experiencing increasing costs resulting from pressure for improved pay and working conditions.

While in **Germany**, the #BlackLivesMatter movement is scantily mentioned in the literature, it was a visible part of public discourse, where it combined with the #MeToo movement to question the distribution of power within training structures and arts organisations. In the wake of the pandemic, however, there is little evidence of broader structural reforms to address racism and sexual harassment in Germany, and endeavours in the **UK**, **USA** and **Canada** to ensure greater participation of diverse creative workers, including in leadership and governance roles, are hampered by post-pandemic sector pressures. In the **USA**, where board membership is closely linked to fundraising, stakeholder interviews suggest that boards are more challenging to diversify than artistic programmes or staff.

Audiences

Organisations across the G7 made efforts to maintain contact with audiences. In the **UK** and **Canada** shuttered non-profit organisations placed increased emphasis on civic engagement and on access and inclusion, delivered through programming both online and in community or public spaces. In **Canada** this has, in some cases, caused a formative shift with organisations offering community meals, transport or 'Pay What You Can' ticketing models. In the **UK** these activities have led to strengthened links with non cultural-sector partners and within local ecologies; organisations with local relationships and infrastructure already in place finding it easier to continue effective engagement, place-making activity and to deliver community programming during the pandemic.^{16,19} In **France**, a gap opened between smaller organisations that experienced severe disruption and larger organisations and venues, which were able to continue operating with pandemic safety measures in place.

Many organisations experimented with or extended their use of digital technologies, reaching existing and new audiences. There were pockets of innovation, such as the ongoing subscription service for VR glasses by the Staatstheater Augsburg in **Germany**, but digital adaptation was challenging for many. Much activity was limited to streamed live or recorded material. Again, those with existing investments in digital skills, knowledge and infrastructure had a head-start on those without.¹⁶ Organisations faced issues with skills, supply chains and capacity. Organisations in the **UK** and **USA** struggled with uncertainties about how to monetise digital creativity and to manage associated financial risks and rights issues,²⁰ and with the absence

of frameworks for streaming agreed by the actors' union (USA). In theatres in **Germany**, 'resilience managers' played a crucial role in adapting programmes and internal structures to new digital requirements.²¹

The pivot to digital, in many ways key to both organisational survival and to networking and lobbying activities on behalf of marginalised parts of the industry and audiences, also proved to be exclusionary for parts of the population and organisations with insufficient access to hardware, expertise, organisational capacity or connectivity (especially in rural areas), as well as those who suffered from digital overload. In **Canada**, the Indigenous Performing Arts Alliance's Tech Bundles programme sought to counter such inequity through the delivery of equipment and online tutorials for Indigenous communities across the country.²² Leading Canadian arts organisations also used digital media to respond to the #BlackLivesMatter movement by creating programmes featuring Black and Indigenous artists that engaged a significant public, including playwrights, directors, actors and students.

Audience data, where available, points to significant shifts in behaviour and attendance both during and after the pandemic.²³ Rates of audience participation in digital activity were initially high but decreased over the course of the pandemic. In the **USA, Canada, Japan** and **UK** however, streamed or digital activity provided important opportunities for inclusion and access for audiences previously excluded or unwilling to attend. It became obvious that knowledge and understanding of audience behaviour in digital spaces was insufficient across all countries. It is notable that audience research in general is recognised as an under-developed field in several of the G7 countries, something being addressed in **Germany** through specific funding as part of the *Neustart Kultur*.

As the pandemic recedes

As the pandemic recedes, most organisations across all countries have re-focused gratefully on live performance. However, attendance at live theatrical events has not returned to pre-pandemic levels, confirming long-term trends. Economic conditions are thought to be suppressing spending and changing demographics are affecting audience profiles. These conditions have led to calls for organisations to re-examine the ways in which they market programming, solidifying moves away from subscription in **USA** and **Canada** and – for example – introducing or increasing use of flexible payment models, including 'Pay What you Can', in some subsidised theatres in UK, USA and Canada.

There is also some evidence of new organisational structures arising or becoming more prevalent in response to challenging conditions, particularly collaborative leadership, increased co-production and moves towards itinerant or residency models. Examples from the **USA** show that organisations need to brace themselves for an increase in temporary closures and adaptations necessitated by natural disasters (fires, floods, storms) linked to the climate crisis, necessitating fresh strategic thinking for the sector.

4. Digital

The shift to online and non-traditional performance spaces and hybrid in-person-and-digital practices and creative outputs was key to how live performance, especially at the start of the pandemic, responded to venue closures across the G7. The accelerated creation of digital content provided opportunities to reach potential new audiences in a global marketplace. However, the activity did not always translate into increased earnings for the workforce. Performances were disseminated via established streaming platforms on which large organisations streamed free archive material that competed with new, often live, pay-for-view digital content on videoconferencing platforms. Some digital content was distributed via new bespoke platforms and repurposed gaming platforms.

In **Canada, Italy** and **Japan**, digital work was incentivised through bespoke grants like the Canadian Digital Now innovation initiative or with the setting up of government-sponsored streaming platforms in Italy (ITsART) and Japan (Stages Beyond Borders). However, in the rapidly evolving post-pandemic digital landscape, platform dependency was identified as a problem. Once lockdowns were ended, streaming offerings rapidly decreased as in-person performances picked up again.

The pivot to digital modes of production and reception helped artists and audiences maintain old and build new cultural communities, sometimes across national borders. There were new international collaborations, with hashtags additionally connecting artists and audiences into transnational communities and videoconferencing facilitating co-ordination of support and advocacy within national borders. With overseas travel restricted and increasingly expensive, **Japan** strengthened its trans-Asian networks and projects, facilitated by online conversations, rehearsals, and co-productions.

Digital modes of producing live performances increased access to work and creative content for previously excluded and/or underrepresented segments of the population, with disability artists in **Canada** highlighted as particularly valuable knowledge sources in digital and equitable performance making.²⁴ In both the **UK** and **USA**, there were notable levels of participation by people of colour (such data is not yet collected in **Germany**). More broadly, digital performance benefited people living with a disability or mental health problem and older or more geographically isolated people as well as parents with young children. Those populations were excluded again with the post-pandemic 'snap-back' to in-person performance.²⁵ Lessons regarding digital accessibility, inclusion, safeguarding, privacy, platform-dependency, audience fragmentation, environmental sustainability and IP need to be explored further.

As new digital conventions emerged and gaming aesthetics were integrated into theatrical productions, so did a resistance to screens and a new emphasis on voices, sounds and physical co-presence. As soon as restrictions permitted, performers moved shows into outdoor spaces, with examples of itinerant musical performances in **France** and collaborative approaches involving local government event planning in the **UK**. In **Italy**, the turn to in-person physical performance has taken the shape of a boom in circus performances, especially in the South; ballet also recovered more quickly than theatre and especially opera. In the **UK, Canada** and **Germany**, the 'snap-back' to in-person performance is in tension with strategic moves to promote digital development in the theatre industry.²⁶

5. Communities, Places, and Cultural Value

The pandemic sparked an increased interest in the role played by arts and culture in supporting wellbeing. Qualitative research and surveys showed that cultural participation, whether digital or in-person, had notable wellbeing and mental health benefits for practitioners and audiences, helping to build morale and community spirit during the depth of the crisis through shared experiences that created a sense of social connectedness and belonging. Artists re-oriented their activities towards socially engaged community theatre and interest in local stories and place-making, alongside outdoor performances. Consequently, the pandemic birthed a new wave of discourse around the value of culture as a transformative social good, emphasising the intrinsic effects of the arts on empathy, social transformation, social justice and individual and community wellbeing. This has fed proposals for new legislation supporting the arts in **Canada**^{27,28} and **Germany**,⁷⁸ where freedom of expression for artists is understood as a democratic bulwark against the influence of the extreme right.²⁹ It has also led to a revitalisation of debates about the social role of the arts and arts workers in **Italy** and **France**. (See 'Workforce' above.)

In the **USA**, where federal government support is routed via the National Endowment for the Arts, whose budget is renegotiated annually, theatre makers lack a collective voice and not-for-profit theatres are in a deep and long-term crisis.³⁰ Advocacy groups such as Americans for the Arts and the Performing Arts Alliance struggle to make the case for cultural value. However, new groupings such as the Professional Non-Profit Theater Coalition and arts agencies and service organisations at the state, county, and city levels, are increasingly making an economic case for culture that is focused on urban job creation and recovery. As in other countries, their efforts are hampered by a lack of standardised data collection on the arts. There are also concerns that changing priorities among the large charitable foundations may be weakening the entire theatre ecosystem.

In the **UK**, theatre makers voiced similar concerns regarding the impact on the ecosystem of redistribution of funding in the Arts Council England National Portfolio for 2023-26. Community-led responses during the pandemic that connected government, cultural organisations and governmental support, as happened in Greater Manchester and Sheffield Council, help make the case for the value of culture.^{16,31} The willingness of funders to ‘flex’ existing funding in response to COVID-19 enabled funded organisations to take more artistic risks and produce community-oriented and educational programmes. Recognising the connection between cultural and economic resilience, Scotland and Wales integrated culture into the roadmaps for socio-economic recovery and the Northern Irish government has also noted the potential for local culture and creative industries to contribute to economic and social recovery.

6. Structures and Systems

Structural inequalities

Across the G7, the pandemic made highly visible the structural inequalities within the workforce, as well as theatres’ reliance on the work of a precarious workforce composed of a majority of freelancers and/or self-employed workers, with common use of unpaid labour. In **Canada**, pre-existing systemic problems highlighted by the pandemic included the historical exploitation of Indigenous peoples and the often tokenistic approach to reconciliation which, in the context of the pandemic, led to Indigenous cultural workers noting that their identities could be exploited by organisations to gain funding in a commodification of identity and trauma.

Regulatory frameworks and crisis support

In all G7 countries, systemic problems were linked to the absence of overarching regulatory frameworks for the sector to establish fair working conditions: problems include the prevalence of project-based work and corresponding short-term contracts, low wages, insufficient resourcing for the development of creative projects, lack of access to professional development and human resources support for freelancers, and lack of recognition of the specialist skills, time and labour involved in applying for arts funding. While calls for some form of Universal Basic Income (UBI) are widespread, only **France**, and **Germany** and **Italy** have bespoke social security systems in place for artists to tide them over periods of unemployment (see ‘Policy and Sector Responses’ above).

As pandemic restrictions eased, pressure to re-open venues and return to live in-person performances at times of high infection rates and likelihood of further lockdown or COVID-19-related cancellations led to extreme uncertainty, pressure and concerns regarding physical safety, mental wellbeing and financial viability of productions. This is where clear national frameworks for resuming work in ‘COVID-safe’ conditions would have been beneficial. For organisations faced with the choice of remaining shut or adopting digital modes of working, a digital divide opened, highlighting the absence of digital infrastructures (hardware, connectivity, in-house skills), sector strategies and regulation surrounding intellectual property law and artists’ rights in the digital sphere.

Regional differences

The pandemic also highlighted differences across cities, regions, nations and/or states, with examples of good practice in parts of a country (e.g., Hesse and Berlin in Germany³²; Québec in Canada³³), often linked to pre-existing and more generous funding conditions, contrasting with less adequate responses elsewhere. In **Italy** too, the crisis exacerbated the substantial divide between northern and southern regions.^{34,35} These differences relate to all aspects of cultural production and access, impacting working conditions, opportunities to enter the profession and diversity of cultural provision for local communities. In **Germany**, the divide has a political aspect: the right-wing party Alternative für Deutschland (AFD) has mounted campaigns in the name of artistic freedom to cut funding for theatres whose programmes address right-wing populism, threatening organisations in smaller cities in the East in particular.

Where there were some perceived geographical imbalances in crisis funding, there were calls for stronger regional cultural leadership and more equitable distribution of support. Longer periods of lockdown correlated with greater difficulties for the sector. Misalignments of COVID guidance and policy (such as those between cities in **Japan**), including different approaches by sector unions, made it difficult for individuals to work across multiple regions/nations/states or internationally. In the **USA** especially, an increase in remote working has had a detrimental effect on urban centres and audiences for downtown theatres, with audiences everywhere slow to return to pre-pandemic attendance levels and shifts in audience demographics that remain to be understood in detail.

Localised policy responses partially alleviated some pre-existing geographical disparities. Strong local networks emerged within the sector; where local, regional and national governments were well-informed about the local cultural landscape and in ongoing dialogue with sector representatives, support was targeted most effectively. In the **UK**, Greater Manchester Combined Authority and Sheffield Council are examples of good practice within devolved authorities where targeted support was based on detailed understanding of the local landscape and consultation with academics and sector representatives.^{16,31} In the UK, too, administrations in the devolved nations were perceived as more supportive of individuals than England.^{36,37}

Research and data

Canada and the **UK** stood out for the amount and quality of research on the creative industries during the pandemic that could aid informed decision-making in the crisis, though studies skewed markedly towards analyses of the subsidised sector and more actionable and detailed data on audience attitudes and workforces is needed. **Germany** and the **USA** comparatively suffered from an absence of audience research and research focused on independent theatre.

Funding

In every country, the pandemic put pressure on the funding infrastructure and revealed faultlines. In the **UK**, **USA** and **Canada**, cultural crisis funding that privileged buildings and 'flagship' organisations to the detriment of grassroots activity or individuals was welcomed because it helped those venues and organisations survive. But it was also widely criticised for failing to produce sufficient 'trickle down' to creative workers and organisations in need.³⁸

Everywhere, the administrative and often unpaid labour burden involved in applying for funding was criticised, especially where there were multiple un-coordinated and sometimes mutually exclusive sources of funding available from different levels of government as well as charitable and other funders that created an overly complex funding landscape for individuals and organisations to navigate. For creative freelancers who had to work outside the sector to survive because of their ineligibility for income support, the burden involved in applying for

funding to remain in the sector could be exclusionary. Where access to funding was simplified, as was the case in the **USA** (where requirements were waived), **Germany** (Hesse's 'Masterplan Kultur') and the **UK** (Arts Council England's streamlined and supported application system for the Emergency Response Funds), this was welcomed.

In the context of decreasing philanthropic giving and a drop in subscriptions or season tickets (a trend especially noted in the **USA** and **Canada**), pre-existing funding models rooted in an ethos of 'neoliberal utility' and focused on measurable social outcomes, such as those prevalent in **Canada** and the **UK**, put a double burden on companies that are asked to reconcile aesthetic and social missions to access funding. There is an implicit problematic contradiction, in both countries, between the emphasis on the cultural sector as a significant contributor to GDP and the fact that in both countries substantial parts of the sector rely on subsidy because of the perceived intrinsic value of theatre as a social good.³⁹ The tension between economic and cultural value explains the frustration of the sector workforce at what they experienced as the governments' inability to understand the sector, with its reliance on freelancers' individual resilience and good will, and a need to recognise the cultural value of the creative industries in terms of aesthetics as well as social and wellbeing benefits.

Lessons to learn from COVID-19 to support crisis preparedness in the live performing arts: recommendations for the UK

Note: for full comparative examples, see the detailed country reports here: [Pandemic Preparedness | Societies and Cultures Institute | University of Exeter](http://tinyurl.com/33dkaf6u) (<http://tinyurl.com/33dkaf6u>).

Recommendation 1: Resilience planning

UK and regional government should support arts councils or development agencies to establish a clear resilience strategy for live performance.

This should include:

1. Power to convene: Identify representatives drawn from all levels and representing different functions within the sector who can be convened into an emergency working group, enabling effective communication and response.
2. Analysis of and learning from devolved nation and regional initiatives that supported the creative workforce and integrated arts and culture more directly in plans for pandemic crisis management, response and recovery.

Arts funders and trade associations, in consultation with unions, should support their funding recipients and members to plan for resilience. This should be broadly understood to extend to consideration of crises caused by new pandemics, climate-related disasters, demographic changes, economic pressures or the impacts on the live performing arts of national and international politics.

This should include:

1. Developing clear, sector-specific guidance for funding recipients and members to support emergency closures.
2. Agreeing a framework to support simplified and inclusive access to emergency funding for smaller organisations and individuals, streamlined reporting requirements and guidelines for use of existing funding.
3. Supporting organisations to plan for climate crisis resilience. This might include contingency plans for weather emergencies by purchasing emergency-response equipment such as generators and water pumps.

This will provide the basis in the long term for:

- Clear and consistent communication to and within the sector during a crisis.
- Co-ordination and tailoring of emergency funding responses.
- Establishing best practice for integrating culture into future crisis response and recovery roadmaps

Comparative examples

Look to Canada and Germany for the impact of regional differences in crisis response (See '6. Structures and Systems' > 'Regional differences')

Recommendation 2: Commission sector ecosystem mapping research

To identify sector vulnerabilities, public funding should be directed towards research and analysis of the live performing arts sector workforce, ecosystem and audience.

This research should:

1. Be carried out across all four nations, artforms and across subsidised and commercial parts of the sector.
2. Include in-depth analysis of the workforce to understand needs, working patterns and artistic life cycles, with attention to racial, gender, socio-economic and national/regional determinants.
3. Involve stakeholders representing all parts of the sector in mapping of the cultural landscape: its interdependent ecosystems and artforms as these relate to place, and its financial / funding structures at local, regional and national levels.
4. Determine the most effective structures required to enable consistent and coherent cross-nation and sector wide understanding of audience behaviour and attitudes (including digital); collect these data and share them with organisations to inform their planning, innovation, programming and audience-building activities.

This work can provide a better understanding to inform policy decisions that:

- Support intermittent, freelance or portfolio creative workers in the UK during periods of partial or full unemployment caused by future crises, or include them within existing social support systems.
- Develop funding and financing structures mindful of the mixed nature of the sector's economy and interdependencies within its ecosystem.
- Lead to development of an artform strategy that can inform future policy and funding decisions.
- Inform and support changes to organisational structures, business processes, financing structures, new digital or community activity, and continued artistic programming in the face of challenging economic conditions.

Comparative examples:

For a bespoke social compensation security system for creative workers, the UK Government could look to the special compensation regime for performing arts workers (*'intermittents du spectacle'*) in France (See 'Policy Contexts' and '1. Policy and sector responses').

For a model of mapping of the cultural landscape that involved industry stakeholders and has resulted in a streamlined and simplified funding system for theatres, the UK Government and Arts Councils could look to Hesse (See '2. Workforces' > 'Employed and freelance workers').

Recommendation 3: Address skills gaps

Address skills gaps in the sector that affect crisis response through staff training, knowledge transfer, and pipelines to attract a diverse workforce for future generations.

This should include:

1. *Arts funders:* Co-ordinate skills and training audits within subsidised organisations and analyse the impacts of identified skills gaps on those organisations and their staff, their productivity, and their wider ecosystems.
2. *Trade associations and Higher and Further Education Institutions:* Work together to provide a bridge between vocational training in performing arts and the skills required in the workplace, involving sector partners and providing the administrative support needed for organisations of all sizes to participate. Consider, e.g. an additional 'M-level' year or integration of workplace training and internships in the final year of a degree.
3. *Arts funders:* Continue to support organisations in opening their spaces and professional development opportunities to creatives within their local communities and in providing employees, including freelancers, with on-the-job training.
4. *Organisations:* Establish best practice mechanisms for knowledge transfer between members of staff within and between organisations.

This will provide the basis in the long term for:

- Resilience in times of crisis when existing workforce and skills gaps are revealed.
- Workers from all backgrounds having the skillsets and networks required to step up into other roles, including management and leadership positions.
- Upskilling and integration of a more diverse workforce, with a focus on succession planning for middle-management and leadership positions.

Recommendation 4: Ensure digital access

Build on the UK's Digital Strategy and the Department of Media, Culture and Sport's 'Sector Creative Vision' to develop a UK-wide strategy which ensures creative organisations, individuals and their audiences have access to digital infrastructure, skills and rights frameworks.

This should involve:

1. *UK government:* Revisit approaches outlined in the UK's Digital Strategy and the Sector Creative Vision in light of changing audience behaviours and new understandings gained during the pandemic about the role of digital and the importance of live in-person performance for resilience and wellbeing.
2. *UK government:* Consider the role and needs of cultural organisations, workers and audiences as a part of strategic upgrading of digital infrastructure, especially in rural areas.
3. *UK Government:* Harmonise approaches to digital rights and intellectual property.
Organisations: ensure these rights are formalised in employment structures and processes.
4. *Arts Councils:* Support development of the new role of 'resilience manager' whose remit is to support organisations with holistic transformation processes relating to effective use, access to, and deployment of digital technologies and skills. In England, for smaller or grassroots organisations unable to implement this internally, the function could be offered through the Digital Culture Network.

5. *Arts funders*: Resource organisations so that they can build accessibility into digital activity as a default, including minoritised creatives in the development of digital inclusivity and accessibility.

This will provide the basis in the long term for:

- Greater sector and community resilience in the event of a crisis: enabling more organisations to participate in digital culture and continue reaching audiences when unable to deliver planned in-person programming.
- Increased audience diversity and inclusion of previously excluded potential spectators such as those with mobility issues; building and rejuvenating audience populations.

Comparative examples

For the inclusion of minoritised creative staff in the development of new models for digital accessibility and inclusion, look to Canada (See '4. Digital').

For the role of a 'resilience manager', look to Germany (See '3. Organisations' > 'Audiences').

Recommendation 5: Recognise cultural value

Build a case for culture that centres its potential for transformative social good, while continuing to recognise its contribution to the economy.

This should include:

1. *Research funders*: Fund mixed methods research (building on the Culture and Heritage Capital programme) to further examine:
 - The comparative impacts of localised differences in investment in cultural funding and access to arts and cultural provision within education on social and economic markers that include health and wellbeing, mental health, community cohesion, educational attainment, and employment and skills.
 - How participation in and attendance at live performance affects individuals' wellbeing and social inclusion.
2. *Arts funders*: Ensure subsidised organisations have funds earmarked to fulfil artistic missions, with additional funds dedicated to community, education and health/wellbeing activities.
3. *Organisations*: Foster purposeful and long-term external partnerships at local and regional levels, including those with research and innovation organisations, health and care, local community, third and voluntary sector groups, and education.
4. *Local authorities*: Develop and implement cultural strategies that support and sustain such partnerships at the local and regional level.
5. *UK government*: ensure that messaging regarding creative occupations and the cultural industry reflects an understanding of cultural value that goes beyond economic contribution and acknowledges the role of culture as a transformative social good.

This will provide the basis in the long term for:

- Economic investment in culture and strengthening of the evidence base for community and health and wellbeing-related activity.
- Networks that consolidate place-making activity, strengthen local, regional and national identities and can form the basis for collaboration and response to crisis conditions and repositories of shared knowledge (see recommendation 1.1).

- Arts organisations with resource to pursue artistic, social, health/wellbeing and educational aims, thus maximising their contribution to local culture and resilience
- Legislative measures requiring public bodies to think about the long-term impact of decisions on wellbeing and culture and that may include protections for artists in terms of workers' rights and freedom of expression.
- Cultural diplomacy and strengthening of UK's international reputation as a cultural leader.

Comparative examples

For examples where cultural value is embedded at a city or regional strategic level in the UK, look to Greater Manchester Combined Authority and, for a less formalised example, Sheffield Council (See '5. Communities, Places and Cultural Value' and '6. Structures and Systems' > 'Regional differences')

For examples of legislative measures to embed cultural value at the legislative level, see Germany's coalition agreement and initiatives to change legislation in Canada (See '2. Workforces' > 'Existing structural disadvantage').

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About 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.

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Published March 2024

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ISBN 978-0-85672-687-3

[doi.org/10.5871/
panprep/9780856726873.001](https://doi.org/10.5871/panprep/9780856726873.001)