

PANDEMIC PREPAREDNESS

LESSONS FOR CANADA'S PERFORMING ARTS
FROM ACROSS THE G7



PANDEMIC PREPAREDNESS: LESSONS FOR CANADA FROM ACROSS THE G7

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INTRODUCTION

This report offers insights gained through the British Academy-funded *Pandemic Preparedness in the Live Performing Arts* project. This project used data from across the G7 countries to evaluate industry and government response to the COVID-19 pandemic with an aim to improve the culture sector's preparedness for future crises. The project was led by the UK-based team of Prof. Pascale Aebischer and Dr. Karen Gray with Co-Investigators in Canada, the USA, and Germany and Research Associates in Japan, Italy, and France, each of whom conducted a review of literature in their respective country, as well as stakeholder consultations where applicable. The project was additionally supported by a Lived Experience Panel of eight industry practitioners from Germany, UK, USA, and Canada who provided feedback on initial and subsequent findings and recommendations. Ultimately, the project offers comparative findings about funding, organizations, workforces, audiences, systems, and cultural value. It also puts forth evidence-based recommendations for governments, funders, unions and sector organizations to support sector resilience.

This specific report focuses on the Canadian findings, with comparative detail added based on best practices and outcomes in other G7 countries as reported by the project's international collaborators. This report is based on a literature review conducted from April 2023-February 2024, which examined writing related to policy context, industry structures, and funding models operating in the live performing arts sector prior to and during the COVID-19 pandemic. The data are centered on theatre but also include information on dance, opera, and music where relevant. To maximize the dataset, the report makes use of government papers, summaries, reports, surveys, and statistics; reports from sector-focused organizations; journalism and trade press articles; and discursive pieces from blogs and newspapers alongside academic literature and peer-reviewed articles. The data included come from qualitative, quantitative, and mixed methods empirical studies as well as reviews, analyzes, and opinion pieces published between 2020 and 2024. 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. Data are of variable quality, scope, and bias, making consultative meetings with stakeholders from federal, provincial/territorial, and municipal governments, unions, arts service organizations, funders, and grassroots organizations important as sense-check mechanisms. This report is limited by its broad scope and brevity, which cannot effectively represent the experiences and concerns of all relevant stakeholders but aims instead to provide a comprehensive overview that is cautious about possible biases.

PREFACE: CULTURAL CONTEXTUALIZATION

This report draws from literature and consultation in a Canadian context, as well as insights from the performing arts sector across the G7 countries. While cross-cultural analysis is an inevitably imprecise task, trends toward cultural diplomacy, the globalization of culture, and increased mobility point to the value of knowledge sharing within an international context. Here, by acknowledging the colonial underpinning of Canada's cultural policies¹ and their formation in relation to creating a Canadian identity distinct from that of the United States,² the complex historical, cultural, economic, and political connections Canada has with France, the United Kingdom, and the United States serve as crucial benchmarks for understanding the evolution of Canadian cultural policies and rationales for supporting the arts.³

THE PRE-PANDEMIC CONTEXT

The cultural policies across Canadian provinces and territories vary significantly, reflecting different historical and cultural contexts. 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^{4,5,6,7,8,9} and, since the 1990s, there has been increased involvement of the private sector, non-profit organizations, local governments, and international organizations in shaping cultural policies.¹⁰ This period also marked the rise of subnational and cultural policies premised on rationales of job creation, economic vitality, creative industry policy, tourism, participation, export, and social cohesion,^{11,12,13,14,15,16,17} with a broad focus on digital creation and technology, supporting Indigenous artists, diversifying participation and engagement, and increasing funding to artists and organizations in Canada's northern territories.^{18,19,20,21}

Acknowledging that Canada's live performing arts operate in the form of commercial organizations, ad-hoc collectives, and unincorporated organizations, and that emerging governance structures will inevitably shape the future of the arts landscape, this report focuses on not-for-profit organizations, which constitute the majority of publicly funded organizations. Despite scholarly critiques around economic policy rationales for supporting the arts,^{22,23,24,25,26,27} the economic impact of the arts and culture sector has traditionally been viewed as a measure of the sector's vitality. Between 2010 and 2019, the live performance GDP grew at an annual rate of 5.9%, and in 2019 revenues from admissions to live performing arts performances in Canada totaled \$3.8 billion.²⁸ Regardless, pre-pandemic live performing arts organizations experienced challenges in audience engagement, high fixed costs, competition for scarce resources, accumulated deficits, issues of gender parity, challenges obtaining cultural spaces and retaining cultural workers, and international competition.^{29,30,31,32,33}

Structural inequity for global majority and Indigenous cultural workers was of critical concern, with issues of 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) prompting a focus on Equity, Diversity, Inclusion, and Indigenization (EDI) among funders, policymakers, and organizations.^{34,35,36,37,38} For arts and culture workers, precarity was of significant issue.³⁹ The majority of artists in Canada are self-employed and many lack job security and access to employer-based insurance and pension programs.^{40,41,42,43} In the year preceding the pandemic, the Canadian Artists and Content Creators Economic Survey (CACCES) revealed that 57% of artists surveyed reported earning income under \$40,000.⁴⁴



A G7 PERSPECTIVE

Across the G7 nations, challenges faced by the live performing arts sector prior to the pandemic included an aging audience base and a decline of traditional revenue streams like subscription models. In both North America and Europe, a heavy reliance on freelance workers, who often faced precarious employment conditions and low pay, coupled with a lack of diversity in leadership roles, was (and continues to be) of concern. Broadly, there have been calls to answer the question of who is responsible for funding the arts, and more specifically, what rationales motivate state intervention in the cultural domain.

In the UK, responsibility for arts and culture is devolved to notionally ‘arms-length’ national arts councils, with additional funding from local governments. Post-2010 ‘austerity’ policies had decreased the UK government’s support for the subsidized sector and resulted in increased reliance on earned and contributed income.

In France, the pre-pandemic era (2010-2017) saw centralized cultural policies aimed at the democratization of culture and the use of cultural diplomacy. The French ‘cultural exception’ (*exception culturelle*) policy rationalizes increased state intervention to ostensibly safeguard the cultural sector from market competition. Some significant initiatives include financial support for cultural organizations; the Pass Culture program, which subsidizes ticket purchases for younger audiences; and an unemployment scheme designed for performing arts workers (*intermittents du spectacle*), aimed to protect contract workers from job insecurity. The *intermittents du spectacle*, formed in 1936, is a social insurance scheme that provides financial support for performing arts workers based on the irregular, seasonal, and contract-based nature of their work. It enables performing arts workers to be systematically considered as employees, where each contract employer pays a salary that includes social contributions for healthcare, pensions, and unemployment. It also allows workers to combine unemployment benefits and part-time contracts, securing stable overall incomes.

In the years preceding the pandemic, the nonprofit arts in the United States, particularly the theatre sector, were navigating a challenging environment. The decline of the subscription model engendered a decrease in ticket sales and the gap between box office revenue and operational costs was increasingly hard to bridge. This led to a greater reliance on state, city, and local government support, which was inconsistent. As government support for the arts declined, philanthropic contributions from corporations, foundations, and individuals were vital. The onset of the pandemic found the already under-capitalized non-profit theater sector in a precarious economic state.

FUNDING RESPONSE

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. Funders responded to the evolving needs of the arts sector with initial efforts akin to placing the performing arts in an induced coma, aimed at supporting organizations, maintaining human infrastructure, avoiding layoffs, sustaining capital operating costs, supporting independent artists, and later reviving programming and audience re-engagement.

The government introduced various funding measures to mitigate the crisis faced by the sector, many of which were implemented without restrictive evaluations and reporting. On 17 April 2020, the government pledged \$500 million to establish the *COVID-19 Emergency Support Fund for Cultural, Heritage, and Sport Organizations*.⁴⁵ The program was administered over two phases, with the initial phase providing a formula-based top-up to past recipients of specific arts and culture programs. This phase distributed nearly 75 percent of its allocated funds by June 2020.⁴⁶ One of the acknowledged pitfalls of the quickly deployed funds was the prioritizing of core organizations who had previously received funding, which caused disparities between smaller organizations (or those who had not previously received funding) and those with an existing funding relationship. The subsequent phase expanded its reach to include organizations that did not receive funding in the first phase and were not current recipients of Canadian Heritage or Canada Council for the Arts funding.⁴⁷ Funding rollouts were complex and federal funders often acted without knowing precisely how provinces/territories were going to target their support, pointing to the challenges of communication and need for coordinated efforts. 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.^{48,49,50}

The pandemic offered some of the most intimate contact between government and sector representatives, noting that regular digital town halls, ongoing contact with arts service organizations, and direct relationships with the artistic community fostered a human connection, gave timely feedback on sector needs, and helped to evolve responsive funding.^{51,52} Attempts to ease the burden on applicants for funding included issuing payments with minimal reporting, revising granting structures for ease of application, and generally 'cutting out the bureaucracy'.⁵³ In March 2021, the Federal government responded with a \$181.5 million allocation to the live arts and music sectors, with funds designated for stabilizing live arts, encouraging digital innovation, and stimulating employment.^{54, 55} Subsequent federal budgets in 2021 and 2022 were targeted at investments for recovery and resilience. The 2021 budget allocated \$1.9

billion to help support the arts, culture, heritage, and sport sectors achieve organizational resilience and pursue business innovation, and to support the reopening of festivals, events, and local museums post-pandemic.⁵⁶ In 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 and \$10 million to support independent organizations.^{57,58}

Throughout the pandemic, arts councils and arts service organizations (ASOs) were central in assessing and addressing community need; collecting, compiling, and disseminating resources; and administering relief programs. While numerous resources were directed toward arts-based relief programs, many ASOs also provided invaluable resources for food insecurity, rent relief, and mental health.^{59,60,61,62,63,64} Many municipalities continued to provide the same level of operational grant funding (sometimes administered by Arts Councils), but the purpose of the funding was altered to include virtual live performances. Municipalities also provided additional recovery funding to the arts sector, often to pay artists to provide smaller live activations within the community.⁶⁵ Various regional efforts highlighted the adaptability of funding initiatives: Saskatchewan Arts launched *PAOP lite* to support previously unfunded arts groups with essential resources;⁶⁶ Newfoundland and Labrador quickly adapted funding criteria to aid both individuals and organizations;⁶⁷ the Manitoba Arts Council's *Sustainability Fund* provided timely, flexible support to arts organizations;⁶⁸ and consultations by the Arts Nova Scotia Board and the Creative Nova Scotia Leadership Council focused on artist-led recovery policies post-COVID-19.⁶⁹ The BC Alliance for Arts and Culture worked toward intergovernmental strategies to support arts-based intervention on community well-being indicating a policy shift towards recognizing the arts as integral to public well-being.⁷⁰

The organizational 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 companies⁷¹ 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.⁷² 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.^{73,74} 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.⁷⁵ Despite the challenges, the Canadian government's emergency benefits were crucial, with 56% of respondents from the Canadian Artists and Content Creators Economic Survey 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).⁷⁶

REVENUE SNAPSHOT AND CURRENT FUNDING TRENDS

Despite an increased influx of government grants and subsidies to support the performing arts during the pandemic, revenues experienced a historic drop of \$783.8 million to \$1.8 billion in 2020 as compared to 2018, with losses in operating revenues outpacing those of operating expenses.⁷⁷ In 2020, the bulk of total operating revenue came from a combination of donations, sponsorship, grants, and subsidies (62.0%, up from 46.1% in 2018), but private sector donations to non-profits declined by 9.2% due to the inability to hold fundraising events or secure sponsorships for cancelled shows.⁷⁸

The performing arts sector experienced significant recovery in 2022, with presenters of performing arts and sports seeing a revenue increase of 145.8%, and the live performance Gross Domestic Product (GDP) being revised to \$3.3 billion.^{79,80}

Recent years have seen a decline in Federal expenditures for the arts. The 2023 Federal budget did not include an extension of supplementary funds via the Canada Arts Presentation Fund and in 2024 it was announced that the Canada Council for the Arts would reduce its spending by \$3.63 million in 2024–25, \$7.33 million in 2025–26, and \$9.88 million in 2026–27 onwards.^{81,82}



FEDERAL FUNDING PROGRAMS USED ACROSS THE SECTOR

Tourism and Hospitality Recovery

Program: Wage and rent subsidy for organizations in the tourism and hospitality industry affected by the pandemic including hotels, restaurants, and event organizers.

Hardest-Hit Business Recovery

Program: Rent and wage support for organizations deeply affected by the pandemic but not eligible for the Tourism and Hospitality Recovery Program.

Canada Recovery Hiring Program:

Assisted hard-hit businesses in hiring or rehiring workers by offering a subsidy of up to 50% of eligible salary or wages (nonprofits ineligible).

Highly Affected Sectors Credit

Availability Program (HASCAP): Offered interest-free loans to businesses and non-profits demonstrating a significant revenue decline, with loans ranging from \$25,000 to \$1 million.

Canadian Emergency Wage Subsidy:

Provided a 75% wage subsidy to employers affected by COVID-19, up to \$847 per week per employee.

Temporary Wage Subsidy for

Employers: Allowed eligible employers to reduce payroll deductions to the CRA by 10% of remuneration paid from March 18 to June 2020.

Canada Emergency Business Account

(CEBA): Offered interest-free loans up to \$60,000 to eligible businesses, with loan forgiveness of 33% if repaid by a specified date.

Work-Sharing Program – COVID-19:

Helped employers and employees avoid layoffs by providing EI benefits to those who agreed to reduce their normal working hours due to a temporary business downturn.

Canada Emergency Rent Subsidy:

Supported businesses, non-profits, and charities with a drop in revenue by covering part of their commercial rent or property expenses.

Small and Medium-sized Enterprise Loan and Guarantee Program:

Guaranteed new operating credit and cash flow term loans for small and medium-sized organizations through Export Development Canada and Business Development Bank of Canada, up to \$6.25 million.

Canada Worker Lockdown Benefit:

Provided \$300 a week in income support to eligible workers unable to work due to a local lockdown.

Canada Emergency Recovery Benefit

(CERB): Supported employed or self-employed individuals affected by COVID-19 and not entitled to EI, offering \$2000 for a four-week period to a maximum of \$500/week for twenty-eight weeks.

Canada Recovery Sickness Benefit:

Offered \$500 per week for up to two weeks to workers unable to work due to COVID-19, quarantine, or caring for a family member with COVID-19.

Canada Emergency Student Benefit:

Provided financial support to post-secondary students and recent graduates unable to find work due to COVID-19.

Digital Originals micro-innovation grants from the Canada Council for the Arts in collaboration with CBC:

\$5000 grants to artists, groups or organizations to either adapt their existing work or create a new work for digital dissemination to the Canadian public during the pandemic.

#CanadaPerforms: Opportunity for performing artists from any discipline to apply for \$1000 grants for livestreamed performances, through the National Arts Centre and Facebook Canada.

UNEXPECTED INSIGHTS

Relationships with Government

One unexpected outcome of the pandemic was the sector's unprecedented direct contact with government decision-makers through technology. Meetings, town halls, and webinars were organized with participation from government ministers, staff, and civil servants, leading to an unprecedented level of communication between the government and artistic communities. The initial period of crisis and uncertainty, compounded with the need for immediate reassurance, brought political staff closer to the sector's challenges. Unions, with which the government previously had no direct funding relationships, gained significant access to the Minister of Canadian Heritage's office, playing a key role in funding programs. Given the flux of funding, unions and arts-service organizations were given agency to design programs that best responded to their community's needs, leading to the creation of the *Performing Arts Workers Resilience Fund*.⁸³

PROVINCIAL FUNDING RESPONSES

The politics of provincial/territorial governments and individual politicians' relationships with the arts directly affected the rollout of relief funding. In BC, government and funders were notably responsive, holding regular meetings to identify stress points and funnel information to funding bodies. Members of the Legislative Assembly facilitated regular discussions with the artistic community and expedited funding relief. In Newfoundland, the small size of the community allowed for increased awareness of, and relationships with, the artists across the province, leading to a relief program for individual performing artists. Highlighting the challenges faced under different government leaderships, artistic communities in some provinces (notably Ontario), lobbied for federal support due to insufficient provincial assistance.

The political weight of the Minister of Canadian Heritage was deemed a valuable resource to the sector. With increased communication, the sector's engagement with government allowed for a more collaborative and responsive model, rooted in an ethos of unity and adaptability.

Subnational intervention during the COVID-19 pandemic evolved to reflect the diverse priorities of each distinct province/territory. Québec, which emphasizes state responsibility for culture to affirm its unique national identity, implemented various support measures that totaled nearly \$850 million between March 2020 and March 2022, a level of cultural investment unparalleled in its history.⁸⁴ In the Atlantic provinces, where culture is viewed as a driver of provincial identity and as a means for catalyzing tourism, there were unique investments. New Brunswick saw the creation of the *Fresh AIR Program* (which resourced artists to engage with the public in provincial parks), implemented ticket subsidy initiatives, and both Prince Edward Island and New Brunswick invested in seasonal festivals.^{85,86,87} Nova Scotia bolstered the work of arts existing organizations and invested in *Light House Go*, an on-demand streaming service

dedicated to providing Nova Scotia content,⁸⁸ and Newfoundland was unique in offering one-time relief payments to individual artists.⁸⁹

In British Columbia, where culture is viewed an economic, social, and community resource, there was considerable collaboration between the public and the broader nonprofit sector.⁹⁰ The BC Arts Council provided \$200,000 to the Vancouver Foundation's Community Response Fund to support arts and culture charities,^{91,92} the province established Showcase BC, a micro-grant program for musicians,⁹³ and also invested in organizational transformation and adaptation.⁹⁴ Saskatchewan was noted for the substantial advocacy efforts among ASOs, with the Saskatchewan Arts Alliance and SaskArts putting forth critical resourcing on the status of artists in the province.^{95,96} In Alberta, there was a broad push toward understanding the new economy of cultural engagement. A coalition of ASOs, organizations, and foundations commissioned *Building Experiences in the New Economy*, a multi-year in-depth analysis of audience behaviours.⁹⁷ Highlighting accessible arts-based programming, Manitoba implemented the *Safe at Home* initiative, for organizations and individuals to produce free programming such as live streaming of the performing arts.⁹⁸ Ontario implemented the Arts Response Initiative: one-time supports for individual artists, ad hoc groups and collectives and arts organizations to support adaptation and new ways of working⁹⁹ and invested substantially in festivals and tourism.^{100,101,102}

Canada's North has historically seen comparatively little funding or infrastructure for the performing arts, especially the Northwest Territories,¹⁰³ and calls for increased funding (i.e. to Nunavut)¹⁰⁴ were recently addressed by new partnerships across governmental levels and between arts councils, foundations, and governments.^{105,106,107} In response to the unique challenges of cultivating the arts within the Northwest Territories (NWT), for instance, the local government has initiated a partnership with the Canada Council for the Arts through a Memorandum of Understanding aimed at bolstering the capacity of arts organizations across the territory.¹⁰⁸



G7 POLICY RESPONSES

The global response to the pandemic's impact on the live performing arts sector was varied and complex, reflecting the unique structures of each country's performing arts sector. Economic measures were the most common form of policy response, including grants or loans to organizations and individuals, income support for workers, ad-hoc relief payments, and targeted business tax relief. These measures often prioritized organizations and venues over individual workers, leading to a significant portion of the freelance workforce struggling to access adequate financial support. Countries like France and Italy took steps to address these challenges by implementing or augmenting social security schemes designed for contract workers, highlighting a more targeted approach to supporting the ecosystem of the live performing arts.

France stands out due to its pre-existing intermittents du spectacle social security program, which serves as a financial safety net for freelancers. During the pandemic, the intermittents du spectacle was bolstered by a partial unemployment scheme (chômage partiel), while cultural organizations received support through the Fonds d'Urgence pour le Spectacle. In contrast with other countries, no massive dismissals, contract terminations, or retraining of performing arts workers occurred. Artists, administrators, and technicians were able to maintain incomes and employment conditions, regardless of closures.

In 2020, Italy provided time-limited benefits for independent artists, which later developed into the indennità di discontinuità scheme, a reform social security for creative freelancers, modeled, in part, after France's intermittents du spectacle.

Germany invested €14.5 billion in cultural spending, the highest per capita investment across the G7. The Neustart Kultur initiative, initiated in May 2020 and continuing until June 2023, provided comprehensive support combining social assistance and funding, including tailored aid for freelancers and reforms to the Artists' Social Security Fund, thus fortifying the safety net for artists.

THE WORKFORCE

The COVID-19 pandemic underscored issues of precarious employment among independent artists and freelance workers^{109,110,111} with significant job losses reported in 2020.^{112,113,114} 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.¹¹⁵ Many arts workers were forced to find alternative employment, with some leaving the sector permanently.^{116,117,118} For backstage workers, this also resulted in a lack of qualified personnel available upon reopening, impacting production schedule, scale, scope, and programming.¹¹⁹ 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.¹²⁰

Keeping workers in the cultural sector was noted as a significant priority among government, arts associations, and funders.^{121,122} 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).^{123,124}

For stage technicians and others in similar roles, the pandemic exacerbated existing challenges, leading some to leave the arts for other industries. The debate over promoting career transitions for those in the arts reflects the tension between preserving the sector and acknowledging the harsh realities faced by its workers. During the pandemic, organizations 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.^{125,126,127} Innovative employment models for actors, such as engaging them as teaching artists or involving them in research projects, were effective strategies for integrating artists into organizational staff post-CERB. The Shaw Festival emerged as a leader in retaining actors by employing them as company members.¹²⁸ Similarly, Talk is Free Theatre in Barrie, ON adopted a unique approach, providing a makeshift form of universal basic income to artists.¹²⁹ This initiative allowed them the freedom to pursue creative projects, including the development of a comprehensive resource package focused on rehearsal protocols, consent, and equity. This resource now serves as a valuable tool for theaters, effectively acting as initial funding for these innovative endeavors.

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.^{130,131} In addition to CERB, one-time relief funds for individual live performing arts workers (Canada Performing Arts Workers Resilience Fund), were distributed at the provincial/territorial levels through arts councils and arts service associations at various stages of the pandemic.^{132,133} The COVID-19 pandemic highlighted a need for income security in the arts sector and there has been significant lobbying for and interest in universal basic income (UBI) from individual artists, arts associations, and arts councils.^{134,135,136,137}

Issues of already extant 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.¹³⁸ The seasonal nature of work, prevalence of short-term and part-time contracts, dependence on voluntary roles, low pay, closed professional networks, and 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.¹³⁹ The relationship between Canadian cultural institutions and Indigenous peoples has been historically fraught with exploitation and tokenism.^{140,141} These issues were exacerbated in the pandemic, with Indigenous cultural workers noting that their identities could be exploited to gain organizational 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 IBPOC artists.¹⁴² 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.¹⁴³

In Hill Strategies' analysis of the Labour Force Survey, research showed that employees in arts and culture are nearly twice as likely to have multiple jobs than other workers, that women are more likely than men to hold multiple jobs, and that multiple job holding in the arts and culture has steadily increased since the pandemic.^{144,145} For those working in the arts in the pandemic, three times as many organizations reported very high or high levels of stress and anxiety today (79%) as compared to before COVID-19 (25%)¹⁴⁶ and pervasive burnout was reported across the sector.^{147,148,149} Inequities also persist within compensation frameworks and labour, notably between salaried employees and self-employed or freelance artists.^{150,151,152,153,154} Amidst conversations about labour in the cultural sector, there also 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 de-commodified, precarious labour.¹⁵⁵

G7 WORKFORCE INSIGHTS

The COVID-19 pandemic inflicted severe job and income losses across the G7 performing arts sectors, with relief efforts aimed at organizational sustainability modeled on a ‘trickle down’ approach that often did not support individual artists. Employees, notably arts administrators and key staff, were often tasked with additional roles that required new skills in digital technology, technical operations, fundraising, and management, as well as roles typically outside their scope, such as public health education and regulation enforcement. This shift increased work pressures and forced a significant learning curve, placing a heavier burden on those employed in the sector.

In all G7 countries, systemic problems were linked to the absence of overarching regulatory frameworks for the sector to establish fair working conditions; specifically, 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 invisible time and labour involved in applying for arts funding. While calls for some forms of Universal Basic Income are widespread, only France, Italy and Germany have bespoke social security systems in place for artists to tide them over periods of unemployment.

Across the G7, freelance workers and those with ‘portfolio careers’ faced particularly harsh conditions. The pandemic worsened existing inequalities, disproportionately affecting marginalized groups, including racialized artists, women, younger professionals, and those with disabilities or long-term illnesses. These challenges were compounded by a significant gender pay gap and regional disparities, leading to a notable exodus from the sector and skills shortages for technical, creative, and management roles.

The mental health of those within the creative sectors suffered greatly, with high levels of stress, anxiety, and burnout. This was aggravated by policies that overlooked the cultural significance of live performing arts. In France, the designation of culture as “non-essential” and the uncertainty of pandemic regulations led to widespread frustration, while in the UK, governmental rhetoric undermined the viability of artistic professions, contributing to a profound sense of loss of purpose and identity.



ORGANIZATIONS

During the pandemic, organizations reported cancellations and postponements of activities, concerns about revenue and fundraising, staff-related issues, audience retention challenges, cash flow problems, a demand for stable support, financial pressures from committed expenses like rent, and the need for additional support beyond regular grants.^{156,157,158,159,160} *The National Arts and Culture Impact Survey* (NACIS) noted that when organizations were eligible for a program, the vast majority used it. In 2020, 62% of the sample of 728 organizations surveyed were eligible for the Emergency Support Fund for Cultural, Heritage and Sport Organizations and 89% applied (55% of total organizations). 51% of organizations 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 favoured benefits by organizations surveyed.¹⁶¹

Many organizations relied on the Canadian Emergency Business Account (CEBA) and the Canadian Emergency Wage Subsidy (CEWS),¹⁶² relief programs that provided interest-free loans up to \$60 000 for small businesses and nonprofits and subsidy of up to 75% of remuneration paid by an employer to each eligible employee, respectively.^{163,164} While the CEWS program did not prevent layoffs, it did help sustain organizational and administrative staff as well as some artists. This program was also responsive to the needs of organizations that operate with 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 earned revenue is their summer program for youth which happens once a year in July. CEWS initially determined eligibility based on an organization’s monthly drop in earned revenue, which disadvantaged organizations like Theatre Alberta who do not have a regular monthly earned revenue. CEWS shifted to an averaging of three months’ drop in revenue, which allowed Theatre Alberta to access support. As a result, the organization could continue to offer services to its members, shifting from offering in-person workshops to 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.

General momentum and focus on EDI related topics was also noted during the pandemic, often through calls to action alongside changes in leadership, programming, or mission at arts organizations of various sizes.^{165,166,167,168,169} 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 views.¹⁷⁰ 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. 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, notably, students.¹⁷¹

While concerns remain about follow-through on reforms and long-term commitment to such EDI initiatives, some organizations 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 for the company and initiatives have 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.^{172,173,174}

Discussions about precarity, labour, and mental health have spurred a deeper look into the role of power and privilege in non-profit organization structures. Voluntary boards and fundraising boards have been critiqued as exclusive, hierarchical, and rarely accounting for the lived experiences of artists.¹⁷⁵ 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.¹⁷⁶ Some have also suggested that the pandemic offers an opportunity to radically rethink organizational structure, lifespan, and relevance,¹⁷⁷ with new grants and funds positioned to support significant shifts, including hibernations, mergers, partnerships, and organizational closure.^{178, 179,180}

More broadly, the evolving nature of arts work has come to the forefront, as the pandemic caused workers in the sector to take on roles beyond their typical job descriptions. During the pandemic, arts workers navigated complex public health communications and had to take on roles as ad-hoc public health officials, engaging in public consultation about public safety, and prioritizing the well-being of artists and the community-at-large. This involved educating the public, implementing regulations, and conveying health guidelines (which often varied across municipal, provincial/territorial, and federal jurisdictions).

In some cases, arts organizations used the pandemic to reframe their relationship with local communities. One example is Edmonton International Fringe Festival. When public health restrictions were lifted, they opened the doors of their venue to everyone, not just audiences and patrons. Acknowledging broader issues facing the local community, Edmonton Fringe also established a community care team, distributing 1,600 harm-reduction kits and nearly 800 naloxone kits within the festival's vicinity.¹⁸¹ This echoes a trend amongst organizations in the pandemic, many of whom reframed the nature of their work to be more embedded in acts of community well-being. The willingness of arts workers to find timely solutions to addressing community needs was seen at The Arts Club Theatre Company in Vancouver, who donated their venue large to a local multidisciplinary medical start-up showcasing low-cost respiratory equipment, and the production team at the Canadian Opera Company, who made more than 1,300 masks with extra material left over from past productions.¹⁸² Strategies were also directed toward internal culture, with organizations addressing burnout and providing access to mental health support for arts workers. Since the pandemic, there has been growing recognition of the talent drain from the sector and the reality of artists holding multiple jobs.^{183,184} Efforts to improve work-life balance have led to significant discussions and negotiations, like prorated fee schedules over longer durations to allow for more flexible rehearsal schedules or reduced work weeks.^{185,186}

UNEXPECTED INSIGHTS: The Role of Buildings

While the ownership or management of capital infrastructure has been a point of pride for many arts organizations, the pandemic underscored the precarious nature of building ownership. Rising costs of construction for owned facilities and increased rental expenses have led funders to reconsider encouraging organizations to own buildings when they might not be able to afford necessary repairs or maintenance. Harbourfront Centre in Toronto, for instance, which houses four theatres, an art gallery, craft studio, and several more indoor and outdoor spaces for cultural programming faces significant maintenance and capital costs that place it in a precarious position.^{209,210} Acknowledging the struggle among artistic communities to find affordable rehearsal and performance spaces, there is a shift towards exploring municipally/regionally owned venues to ensure affordable rental spaces.

Accessible spaces are a priority for both organizations and funders, and there needs to be more research into the viability of both purpose-built and non-purpose-built spaces. While there have been substantial efforts to refurbish downtown cores and include artists, there are barriers posed by real estate agents, land boards, lenders, and insurance brokers.^{211,212} This is compounded by high rental costs in urban centres, which has caused many artists to leave for smaller communities.^{213,214,215}

THE DIGITAL DILEMMA

The pandemic highlighted the challenges of digitization in the live performing arts, including the labour constraints in creating live performance for digital mediums, the educational and financial constraints in achieving high-quality digital productions, and limited revenues from livestreaming and digital offerings. Issues of access and technological fluency were made visible,^{187,188} including the fact that not all artists and organizations, especially in rural communities, had equitable access to high-speed internet, equipment, or know-how to allow them to participate in this revised marketplace, which limited the reach of digitization efforts.¹⁸⁹ One example to address such disparity was 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.¹⁹⁰

Innovative online performances from theatre companies and platforms, like the Social-Distancing Festival, offered ways for artists to share work during the pandemic, but this did not always translate into artists continuing to receive income.¹⁹¹ A gap in skillsets and resources also 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, with varying levels of success.^{192,193,194,195,196,197,198,199,200,201} Companies with pre-existing digital offerings and/or infrastructure were able to pivot or increase offerings more easily, such as FoLDA (Festival of Live Digital Art) which has an inherent connection to digital performance,²⁰² and the Stratford Festival, which 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.²⁰³

In terms of online performance, disabled artists were highlighted as a particularly important knowledge source in digital and equitable performance making due to their experience working in/with technology, in flexible and responsive working models, and with adaptive and innovative approaches.²⁰⁴ Accessibility was also touted as a particular benefit of digital offerings,^{205,206} while international competition was emphasized as a challenge for Canada as it competed against offerings from larger English-speaking countries for audiences.²⁰⁷ The challenges of discoverability of Francophone and other non-English creations pointed to an imbalance in digital access to non-English content.²⁰⁸ Overall, a flux of unrestricted grants combined with a surge in Digital grants from the Canada Council allowed many organizations to experiment in a way that was new, but broadly, the creation of digitization was viewed more as a way for organizations to resource unemployed artists, a tool for connection among artists and audiences, and a vie for visibility, rather than a true pivot, marketing, or revenue strategy.

ORGANIZATIONS ACROSS THE G7

Emergency funding for arts organizations was eagerly accepted across countries in the G7. Germany provided substantial support to both small independent arts organizations and large, previously well-supported state institutions, fostering collaborative work opportunities across the sector. In Italy, the difficulty for some venues to reopen prompted a shift to new locations once restrictions were lifted, leading to an increase in diverse performance spaces compared to pre-pandemic levels.

As the pandemic progressed, there was growing concern over staff mental health and wellbeing, with organizations responding by integrating freelancers more fully into their operations, adopting caring leadership approaches, and exploring collective leadership models. In the United States, the manifesto by We See You White American Theater (WSYWAT) was put forward to address persistent racial inequities in the theater sector. Advocating for anti-racism in theatre work environments, WSYWAT demanded fair employment conditions and recruitment methods, equitable artistic and curatorial approaches, appropriate compensation and financial support, enhanced accessibility, accountability, and improved training programs, among other initiatives.

The shift towards digital platforms was central as an employment strategy, for connecting with audiences, and for improving accessibility, but it excluded those lacking in digital resources or facing digital fatigue. Innovations like the VR glasses subscription service by Staatstheater Augsburg in Germany highlighted digital opportunities, yet many organizations faced challenges in digital engagement and monetization. In France, the pandemic widened the divide between smaller and larger organizations in terms of operational capacity. As new digital conventions emerged and gaming aesthetics were integrated into theatrical productions, so did a resistance to screens and a new emphasis on physical co-presence. As soon as restrictions permitted, performers moved shows into outdoor spaces. For many countries, the return to live performance was at odds with strategic initiatives aimed at enhancing digital innovation, with attention needed on issues related to accessibility, inclusion, protection, privacy, reliance on platforms, division of audiences, environmental sustainability, and intellectual property rights.



Audiences and charitable giving

In response to the pandemic, there has been increased interest in audience research, as data point to a significant shift in audience behaviour and attendance.²¹⁶ The impact of the pandemic on mental health revealed the challenges of readjusting to social settings. The social anxiety of 'returning to public life' represented a broader societal shift in mindset rather than mere fear of illness. This adjustment period is contrasted with the anticipation of 'returning to the theatre', suggesting a complex relationship between the desire for communal experiences and the inertia of isolation habits.

Trends in cultural engagement vary cross-provincially, with attendees from Prairies and Ontario reporting a negative change in their cultural expenditures, while British Columbia, the Atlantic region, and Quebec are poised for a positive shift in attendance.^{217,218,219} In Alberta, market conditions have suppressed spending and audiences have indicated that their threshold for poor experiences is low.²²⁰ Research has pointed to a shift toward social and experiential events, with for experiences that 'guarantee entertainment' over variety or learning. Affordability, proximity to 'home', and offerings that are immersive, gamified, diverse, and focus on the intrinsic value of gathering together, have been described as increasingly important.^{221,222,223} Audiences are increasingly non-comital, but noted shared experiences, emotional escape and well-being as key motivations for attendance.²²⁴ While some data evidence declines in audience attendance and concerns about retention,²²⁵ others suggest the possibility of an upward trend in spending on arts and culture in 2024,²²⁶ suggesting overall unpredictability and uneven recovery across the country. 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 organization to program to an imagined homogenous, stable audience.^{227,228}



Trends in giving

Amidst a decline in philanthropic giving, arts and culture organizations have found themselves in a doubly precarious position, capturing only a sliver of Canada's philanthropic giving. Recent research shows that for every hundred dollars donated by those who frequent the arts, only eleven dollars are directed towards cultural institutions.²²⁹ This allocation not only highlights the financial challenges faced by the arts sector but also offers a window into the priorities and perceptions of its patrons. In terms of motivations behind giving to the arts, people who attend arts and culture events but who donate exclusively to other cause, say the top reasons are that the arts are not of personal importance (33%), that their taxes already support cultural organizations (32%), that they have not been asked to donate (23%), or that cultural organizations don't have the same level of impact on the community or world (22%). Despite these challenges, nearly half (46%) of culture-goers state that their primary motivation for donating to a cultural organization is a deep-seated belief in its cause, purpose, or mission, with only 26% reporting that they are driven to give by the value these institutions add to their local communities.²³⁰ These trends echo a broader decline in philanthropic giving. The Giving Report reveals a decline in charitable donations among individual households in Canada, with the percentage of donors dropping from 36% in 2010 to 28% in 2022.²³¹ The Charity Insights Canada Project (CICP) reports further notes declines in revenue for registered charities in Canada as of May 10, 2023, with the most significant drops in event-based fundraising (40% of responses) and individual contributions/donations (31% of responses).²³²



Audiences across the G7

During the COVID-19 lockdowns, the United Kingdom experienced a significant shift in consumer habits with a surge in engagement with streaming, gaming, and recorded performances of music or dance, attracting 43% of the population to digital cultural content. The digital realm became a space for 'watch parties,' creating a virtual sense of 'liveness' and community. However, as the pandemic waned, there was a noticeable shift back towards in-person experiences, with outdoor performances gaining popularity for their connection to local spaces and nature. This period also saw a cautious increase in in-person participation in live performances through 2021 and 2022, particularly challenged by the need for social distancing, flexible ticketing, and the difficulties of reopening venues, with rural areas showing particular hesitancy in returning to live events. In the US, calls for a re-examination of the subscription model suggest wider shifts in audience preferences, patterns of attendance, and theatre programming.

In Germany, the pandemic underscored the significant loss of theater audiences, accelerating a two-decade trend of declining theater subscribers and sparking a newfound focus on audience reach and digital aesthetics. The Neustart Kultur included funding on audience research, and the Theatre Chur in Switzerland emerged as a successful case of digital adaptation, drawing in a wider audience through innovative online formats. This shift towards digital offerings and platform thinking aimed to enhance adaptability and participation, reflecting a broader recognition of the need to understand and engage with audience behaviour in digital spaces, an area identified as underdeveloped in several G7 countries.



THE SHIFTING ROLE OF THE PERFORMING ARTS

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.^{233,234,235,236,237} Many organizations continue to struggle significantly financially, and cancellations and postponements continue years after pandemic restrictions were lifted, though the effects are not felt universally. This has led to increased defense of the value of live performance.^{238,239}

Here, there is a noted chasm between the sector's desire to return to live performances, funders expectations for social/economic outcomes, and audiences desire for entertainment-driven experiences.²⁴⁰ The pandemic enumerated the ways in which the performing arts ecosystem models innovation, care, resiliency, and public responsibility. Yet, as funders increasingly view the arts as a means to enhance quality of life, a significant gap has emerged between the ambitions for the arts' role in well-being and the performing arts' ability to achieve these outcomes with limited resources. It, too, highlights the ambiguity of social-policy instrumentalism in the arts, wherein language of impact is founded more in its potential to advocate for art rather than its actual ability to enhance our understanding of how and why engaging with art can affect audiences, or the public at-large.^{241,242,243}

Acknowledging that there are a myriad of artistic forms within the performing arts, it is clear that the uniqueness of the sectors' working conditions (i.e. condensed rehearsal periods, unpaid preparation labour, intermittent work, seasonal production, etc.) intensify the labour demands in its communities. This is compounded by a precarious landscape for self-employed workers, who often hold multiple, low-paying jobs. Here, the invocation of the civic/social role of the arts has the potential to overburden cultural workers with the need to address social issues alongside artistic and economic achievement.



NOTES FROM THE FIELD

In an effort to highlight the advocacy initiatives being put forward by the performing arts sector, the following is a summary of key initiatives.

A detailed summary can be found in Appendix 1

Modernized income supports for individual artists: There has been broad advocacy for the implementation of a universal basic income project for artists and an expanded employment insurance system that accommodates the unique circumstances of self-employed artists and accounts for invisible labour.

Permanent funding and investment: Advocacy led by the Canadian Arts Coalition and various arts service organizations calls for a \$350 million permanent investment in Canadian Heritage and the Canada Council for the Arts, with an emphasis on equitable project and operational funding across provinces. The Canada Council for the Arts has increased its allocation to first-time grantees, raising concerns about future resource allocation as these applicants qualify for core funding.

Region-specific support: Organizations in Manitoba, Saskatchewan, and Alberta have highlighted regional funding disparities and proposed that \$15 million annually be allocated to support the performing arts in these provinces through Prairies Economic Development Canada, rather than the Canada Council for the Arts.

Funding for inflation and recovery: Led by the Canadian Association for Performing Arts (CAPACOA), various ASOs has proposed making permanent and increasing funding for the Canada Arts Presentation Fund (CAPF) and the Building Communities Through Arts and Heritage (BCAH) program to address inflation and increased demand, especially from equity-deserving groups and organizations seeking emergency and recovery funding.

Increase investment in arts training: There has been a call for increased funding to the Canadian Arts Training Fund (CATF) to support professional skills training.

Investment in modernization and accessibility: There has been advocacy for additional funding to the Canada Cultural Spaces Fund and the Green and Inclusive Community Buildings Program to support the sustainability, safety, accessibility, and modernization of arts spaces.

Operational/administrative costs: The Professional Association of Canadian Theatres (PACT) has lobbied for an increase in the percentage of eligible administrative expenses in Canadian Heritage funding initiatives to address rising operational expenses, especially in rural areas.

Charity policy and communications: Suggestions have included partnering with Canadian charities to increase awareness and support for charitable giving, evaluating tax incentives, and addressing the impact of the Alternative Minimum Tax (AMT) changes on charitable revenues, with arts organizations suggesting the implementation of the proposed AMT be delayed until its impact on charitable revenues is determined.

Tourism as strategic investment: Recommendations have been put forward for tax credits to encourage attendance at Canadian theatre productions, as well as investments in campaigns promoting Canadian live performances as tourist experiences.

Tax credits for Canadian productions: Proposals for a tax credit system for the live performance sector to attract large-scale productions and stimulate job creation and economic returns.

KEY TAKEAWAYS

Funding measures targeted toward organizations do not always ‘trickle down’ to self-employed artists. The pandemic revealed the precarity of individual artists and the limitations of focusing on organizational support. COVID-19 led to substantial income loss, notably among self-employed workers, causing many artists to seek alternative employment, with some leaving the sector permanently. CERB was described as a ‘lifeline’ during the pandemic, offering a potential model for income support, along the lines of the social security schemes in France, Italy, and Germany.

The pandemic exacerbated existing systemic inequities within the cultural sector, affecting marginalized groups disproportionately. The challenges of seasonal employment, dependence on temporary contracts, low wages, issues of mental health and burnout, and discrimination were compounded. The pandemic was particularly precarious for female-identifying artists, caretakers, and racialized and Indigenous cultural workers.

The pandemic fostered unprecedented direct contact and collaboration between the arts sector and government decision-makers. The role of arts service organizations (ASOs) was central in facilitating more responsive decision-making and human relationships were key to driving policy change. Funders noted the need for data-informed decision-making and drew from lived-experiences as data sources. Consultation, town halls, and direct feedback from the community were viewed as timely and valuable sources of data.

There was a complex discussion around the relationship between public benefit and market viability. This highlighted the tension between projects that require public funding to survive and the interpretation of market success as an indicator of public interest. As the performing arts landscape evolves, there has been increased interest in the role of the arts in public well-being, but little attention has been paid to the labour conditions under which these services are being performed.

Political priorities influenced the effectiveness of relief funding. The proactive engagement of certain governments contrasted with challenges faced in others, highlighting the inconsistency of support across different regions and the politicization of arts funding. Differences in provincial/territorial subnational policies have led to calls for decentralized funding in some regions (i.e. the Prairies), as well as a requests for secured funding for the Canada Council for the Arts.

KEY TAKEAWAYS

Emergency public funds were a lifeline for organizations, particularly for those with income that varied seasonally (festivals, etc.) The “triple bottom line” of revenues, grants, and donations has shifted. A decline in philanthropic funding and audience revenue points to a shift in business models to account for fewer subscriptions, fewer return audience members, and a drive toward experiential events. This shift is occurring at a time of significant organizational stress.

The language of innovation was frequently used in the context of single-project funding and was criticized as potentially stifling long-term sustainability and growth within the sector. The projectization of arts funding was criticized for its neoliberal logics at the individual artist level and its hindrance to sustainability at the organizational level. Operating support has been noted as integral to the survival of performing arts organizations.

During the pandemic, arts and culture workers were collectively committed to maximizing time and resources, to engaging in public consultation about public safety, and in prioritizing the well-being of artists and the community-at-large. This points to the sector’s capacity to innovate and deliver programming under challenging circumstances and to the value of the ‘soft skills’ employed by cultural workers. The sector’s collaborative ethos extended to the community at-large, suggesting that cross-sectoral collaboration with non-arts programming is viable, but requires substantial reliable operational resources to enact.

The pandemic underscored the precarious nature of building ownership and the need for affordable rehearsal and performance spaces. Exploring municipally/regionally owned venues, prioritizing accessible spaces, offering affordable rents are essential for organizational sustainability.

Despite resources and interventions into digital creation there are challenges to producing high quality digital content. The sector has been premised on a model of ‘liveness’ that demands substantially different skills than digital production. In response, there has been a reticence to ‘go-digital’, along with an awareness of global competition and limited revenue models for the digitization of live performance.

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CONCLUSION

The 2022 UNESCO Global Report, *Reshaping Policies for Creativity – Addressing culture as a global public good* argues that creativity is an inexhaustible source, but that facilitating creation demands the necessary economic and social rights frameworks and strategies for artists to do decent work and contribute fully to the development of societies.²⁴⁴ The COVID-19 pandemic served as a critical juncture for Canada’s arts sector, revealing profound vulnerabilities and systemic inequities that have long underpinned the employment landscape for artists. Through our research, we have come to understand that these problems span the breadth of the performing arts across the G7 countries. The stark realities of job losses, income reductions, and the exodus of creative have highlighted the precarity of self-employed artists and the gaps in the funding landscape, calling for a revised role of public sector in the future of Canadian creation and production.

The evolving landscape of philanthropy, audience engagement, labour shortages, and production costs have called to question the state of the “mixed” or “balanced” model, whereby non-profit arts organizations rely on a combination of public, private, and earned revenues. Here, it must be acknowledged that while organizations will inevitably evolve, their evolution is stifled by limited human resources, financial capacity, and sector-wide fatigue.

While this research aims to understand the impacts of the COVID-19 pandemic on the live performing arts sector, it is important to acknowledge the limitations inherent in the scope of this report. Insights from broader G7 research point toward a need for substantial investment in arts education, incentives for engaging younger populations, attention to the policy and legislative needs to address the effect of AI on artists and cultural production, and the pressing effects of climate change on the live performing arts. These have been acknowledged as spaces for future research and have been factored into our recommendations.

What follows are a series of recommendations, based on the findings of the Pandemic Preparedness in the Live Performing Arts project.

RECOMMENDATIONS

1. Commission research on income supports for individual artists

The Canadian government should commission and fund timely research on a social security system for artists.

This research should:

- Provide insight into the artistic, economic, and social impacts of CERB in artistic communities.
- Include a cross-provincial/territorial analysis of current support for individual artists and their impacts on associated communities.
- Incorporate an examination of existing career patterns in the performing arts to comprehend the dynamics of employment and precarity in artistic careers. This analysis should focus on the influence of factors such as race, gender, socio-economic status, and geographical location on these patterns.
- Consider invisible labour in the arts and its intersections with race, gender, and socio-economic status.
- Resource arts service associations to enlist artist feedback on existing funding structures, including artist-led recommendations to provide the basis of future support structures.
- Evaluate protections for inflated cost of living and its effect on artistic communities.
- Expand upon mental health resource needs in artistic communities.

Considerations:

1. CERB was described as a “lifeline” for many artists, with Universal Basic Income often cited as a preferred solution to offset precarity and enhance the vitality of artistic creation. The precarity of artists’ income, especially post-CERB, and the challenges faced by arts workers in balancing multiple jobs highlight the viability of UBI solutions over project-based granting or ‘trickle-down’ support from organizations. The aforementioned research would provide a comprehensive basis for a social compensation security system for creative workers.

RECOMMENDATIONS

2. Revitalize granting mechanisms

Arts funding councils and arts funding partners should:

- Maintain flexible reporting and streamlined application processes.
- Commission research on the effectiveness of project-based grants as a mechanism of organizational and individual support.
- Implement consistent operating support for arts organizations.
- Assess the implications of prioritizing first-time grantees on long-term sustainability.
- Support organizations in funding transitions.
- Provide a network for ongoing collaboration among councils, to evaluate granting and reporting mechanisms and increase communication.

Considerations:

1. The importance of the Canada Emergency Wage Subsidy program suggests that baseline operational support for organizations is important. Stakeholder consultations highlighted the importance of reliable and consistent operational funding as integral to the success of arts organizations.
2. The labour challenges in managing and applying for funding through various arts councils and levels of government were highlighted. To decrease the administrative burden on artists, centralized funding parameters (with minimal reporting requirements) should be considered.
3. Inequity between organizations already receiving funding and those who had not yet received arts council funding limited access to support and added to pre-existing issues around who receives arts funding in Canada. While prioritizing new applicants has mitigated some inequities, it has created a flux in demand.
4. Our research highlighted a need to redistribute funding across a broader spectrum of organizations. During this process, resources should be deployed to offset the negative impact of decreased funding. This includes incentives for co-production and collaboration, and an investment in partnership strategies.

RECOMMENDATIONS

3. Support organizational transformation in the live performing arts

The Government of Canada should incentivize organizational transformation in the arts, in conjunction with the Canada Council for the Arts and provincial/territorial arts funders, with the following foci:

A) Research and development:

- Allocate funds specifically for research and development in new artistic forms, audience engagement strategies, or operational models.
- Commission research on the effectiveness of “transformation” funding and barriers to implementing new organizational models.
- Support the work of advocacy/ research platforms (Imagine Canada, PhiLab, Mass Culture) to increase knowledge mobilization between the arts and the broader third sector.

B) Financial incentives and funding support:

- Provide long-term granting initiatives (3-5 year minimum) aimed at organizations that are looking to transform their business models and develop new technologies. The focus should be on sustainable organizational transformation instead of short-term innovation.
- Offer tax relief or credits to organizations that invest in new technologies, training, or that are involved in cross-sector collaborations.

C) Regulatory adjustments and supportive legislation:

- Ensure that regulations are flexible enough to accommodate new and emerging forms of live performance, including outdoor, site-specific, or non-traditional venues.
- Provide clear guidance and support on intellectual property rights, especially in the context of digital performance and collaborations.

D) Cross-sector partnerships:

- Incentivize partnerships between performing arts organizations and higher education institutions, the commercial sector, and the third sector.
- Establish frameworks for affordable and equitable resource-sharing among arts organizations.
- Facilitate international exchange programs or co-productions to allow organizations to learn from and collaborate with international peers.
- Fund and facilitate workshops, seminars, and courses focusing on new media, digital tools, audience development, and other relevant areas.

E) Resource Sharing:

- Create pathways for the sharing of physical space, labour, and materials amongst artists and arts organizations for long-term sustainability.
- Pilot projects for shared physical infrastructure between municipal/region governments and nonprofit arts organizations (i.e. cultural hubs, centres in urban cores, multi-use spaces, etc.).
- Develop policies to ensure equity management of arts-based infrastructure across multi-stakeholder projects.

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- Create a platform for communication across various unions, to ensure transparency of regulation.

RECOMMENDATIONS

Considerations:

1. Our research showed that live arts organizations must prioritize organizational transformation, but given the precarity of cultural workers, that transformation must be a sustained and supported process. Funding should be invested in alternatives to the subscription model, in cross-sectoral partnerships, and in resource sharing to support both environment sustainability and work-life balance.
2. Unlike traditional funding models that focus on short-term projects or innovation-specific initiatives, arts funders should prioritize long-term, sustainable change in conjunction with nonprofit, private sector, and academic partners.
3. Acknowledgement of the prolonged nature of pandemic recovery must occur in policy planning. Policies should be designed to support transformational growth rather than merely conserving existing structures and be cautious not to redouble the burden of the arts as a tool for rebuilding and revitalizing society post-pandemic.

4. Invest in digitization strategies and audience engagement in live performing arts organizations

The Government of Canada, in conjunction with the Canada Council for the Arts and provincial/territorial arts funders, should invest in strategies for digitization and audience development:

Audience development and engagement:

- Support programs that engage diverse communities, making the performing arts more accessible and developing new audiences.
- Establish pathways for knowledge exchange between commercial live arts and subsidized live arts.
- Incentivize long-term collaborations among arts and culture and tourism sectors.
- Promote partnerships with universities and arts service organizations to expand the role of audience research in the live arts.
- Support the use of data analytics to understand audience behaviors and preferences, aiding organizations in making informed decisions about their transformation strategies.

RECOMMENDATIONS

Deploy training on digital skills and digitization strategies

- Fund or provide spaces where organizations can experiment with new forms of performance, such as immersive or interactive experiences.
- Develop and fund comprehensive training programs focused on digital skills for artists, artis administrators, and technicians.
- Expand dedicated funds to support projects integrating digital technologies into live performance.
- Invest in development infrastructure that enables high-quality live streaming and digital distribution, especially to rural and under-resourced areas.
- Provide resources for hiring in digital marketing, helping organizations to effectively promote their transformed offerings.

Considerations:

1. Organizations reported requiring data but being wary of over-surveying their members or lacking the requisite skills and capacity to do so. Partnerships with academia would help strengthen data gathering and analysis, especially in scalable areas like audience research. Large-scale, long-term, and coordinated projects would also allow for better communication and data-sharing amongst organizations to bolster datasets and offer more robust findings.
2. Lack of digital skills and know-how limited the efficacy and longevity of organizations' pivots to online formats of artistic creation and administration. A more robust and coordinated system of training and education that can be deployed in both precedented and unprecedented times would help improve inequities in access and help to better leverage the possibilities of the digital both artistically and administratively.

RECOMMENDATIONS

5. Prioritize anti-racism, equity, and accessibility in the live performing arts

Governments, funders, and arts organizations should continue to support anti-racism, equity, and accessibility in the live performing arts, with the following foci:

- Develop and enforce policies that ensure equitable recruitment, retention, and promotion practices. This includes actively seeking diverse candidates, creating clear, unbiased criteria for advancement.
- Conduct an accessibility audit of physical and digital spaces and implement necessary modifications. Provide training for staff on best practices for accessibility and inclusivity.
- Support initiatives that encourage full implementation of the Truth and Reconciliation Commission of Canada's Calls to Action and address the challenges of colonial data gathering, operating, and reporting structures for Indigenous artists and organizations.
- Resource mental health support for arts workers and support best practices in work-life balance.

Considerations:

1. The pandemic exacerbated mental health issues and burnout and highlighted systemic racism and access issues in the arts sector. Implementing robust mental health support and concrete equity measures as part of large transformational change across stakeholder organizations is crucial to developing a diverse arts ecosystem.

RECOMMENDATIONS

6. Create pathways for the sharing of physical space, labour, and materials amongst artists and arts organizations for long-term sustainability

In order to ensure sustainability of the performing arts industry while mitigating the risks of gentrification, government at the Federal, Provincial/Territorial, and Municipal levels should:

- Encourage the sharing of resources amongst arts organizations through the creation of affordable multi-use spaces.
- Support venues through granting investment mechanisms and new partnership projects between Municipal governments and arts organizations.
- Develop a comprehensive policy framework to address potential negative impacts of gentrification on artistic communities, including measures to control rent increases.
- Encourage and support the adoption of sustainable practices in production, operations, and facility management.
- Incentivize greening initiatives and education on crisis management in the context of environmental disasters.
- Incentive strategies for resource-sharing to reduce the environmental impact of larger-scale productions.

Considerations

1. Consideration for environmental sustainability and environmental impact is necessary moving forward across the sector to address the climate crisis and insulate against the effects of future possible environmental disasters.
2. Reports of the challenges of physical infrastructure and its contribution to ongoing precarity mean a rethink of the centrality of buildings is necessary. Concerns over sustainability of organizations as well as environmental issues suggest that the sharing of resources is key for the long-term health of the performing arts industry.
3. Stakeholder consultations pointed to the role of artists in the revitalization of vacant downtown cores. Should this approach be considered, policy solutions must be put in place to offset the potential negative impacts of gentrification on high costs of living. Potential solutions include an increase in municipally, or regionally owned infrastructure, operated in partnership with arts organizations.

RECOMMENDATIONS

7. Establish a foundational role for arts as central dimension of civic life in Canada

The Government of Canada, in conjunction with the Canada Council for the Arts and arts funders, should create a substantive and ongoing system of support for the arts sector by:

- Increasing operational support to arts service organizations to maintain communication between government, arts organizations, and artists.
- Investing resources in the promotion of the arts as a foundational dimension of public and civic life, moving away from instrumentalist arguments for the arts' public value.
- Strengthening efforts to elevate the importance of arts in society and integrate arts education more prominently in provincial/territorial education systems.
- Investing in school and public arts initiatives.
- Investing in incentives for audiences (i.e. youth culture passes) and audience research that examines the impact and value of arts and culture.

Considerations:

1. Reports of increased communication between government, policymakers, funders, and artists and organizations was vital not only for rapid, responsive funding support but also for the mental health and well-being of arts workers.

2. The COVID-19 pandemic highlighted the importance of having unified and consistent lobby and advocacy initiatives, and the relevance of arts service organizations in communicating with multiple stakeholders.

3. The COVID-19 pandemic enumerated the challenges of neoliberal and instrumentalist policy mandates. A revitalization of the live arts sector would involve a comprehensive reinvestment in the arts' central role in society - one that resets the understanding of arts as an integral dimension of public life, beyond its potential in political, social and economic dimensions.²⁴⁵

APPENDIX 1

Canada Council for the Arts & Canadian Heritage

Permanent funding, indexed investments, and core grants

Propelled by the Canadian Arts Coalition, many arts service organizations (Association for Opera in Canada, Theatre Calgary, etc.), have moved to advocate for \$350 million in permanent investment to Canadian Heritage and the Canada Council for the Arts, prioritizing equal amounts of project and operational funding into the Western provinces and Eastern Provinces.^{246,247}

At the same time, there has been a push for adequate and indexed investment in the arts through core grants (at the Canada Council for the Arts and Department of Canadian Heritage's Arts Branch)²⁴⁸ In 2022–23, the Council allocated 27% of its project funding, amounting to \$56.7 million, to 2,498 first-time recipients, surpassing its commitment to dedicate at least 20% to new grantees.²⁴⁹ While the Council's focus on first-time grantees has significantly increased new applicants, it has raised concerns about the long-term implications of this strategy, as 700-900 of these organizations will soon qualify for core funding, potentially straining resources.^{250,251}

Advocating for region-specific support

A group of performing arts organizations based in Manitoba, Saskatchewan, and Alberta collectively advocated for substantive changes to arts funding in Canada, noting a funding discrepancy that is unsustainable for the future of arts and culture in the prairies. Pointing to the fact that the Government of Canada cannot instruct the Canada Council for the Arts, an arm's-length Crown corporation, to rectify funding inequities across regions, the coalition of organizations proposed that 15 million dollars be dispersed annually to support the performing arts across the prairies, but that the money be administered through the Prairies Economic Development Canada (PrairiesCan), not Canada Council for the Arts.²⁵² Positioning the arts more overtly in the realm of economic development, this coalition has advocated for the inclusion of the performing arts in PrairiesCan's mandate, emphasizing the sector's substantial contribution to the economy and community of Alberta, Saskatchewan, and Manitoba.

Department of Canadian Heritage

Funding for inflation and recovery

In October 2022, The Canadian Association for the Performing Arts (CAPACOA) advocated to make permanent the supplementary investments of \$8M per year in the Canada Arts Presentation Fund (CAPF) and of \$7M per year in the Building Communities Through Arts and Heritage (BCAH) program, a budgetary suggestion that has been endorsed by leading arts organizations, art councils, and arts service organizations nation-wide (Appendix 1)²⁵³ These two programs, whose funding portfolios have not been adjusted for inflation, nor increased demand, saw a flux of new clients from equity-deserving groups, as well as new organizations seeking emergency and recovery funding.^{254,255,256}

In addition to the suggested permanence of the CAPF and BCAH, leading organizations advocated for an increase of \$30 million per year in these two programs to support the adaptation and growth of the live performance sector in the post-pandemic era.²⁵⁷

Increase Investment in Arts Training

In response to a need for equitable support for professional skills training, the Canadian Arts Coalition, Professional Association of Theatres, IATSE, and Canadian Opera company suggested an increase to the Canadian Arts Training Fund (CATF) to provide equitable support to professional skills training, open training initiatives led by arts producers and presenters, and support stage and production workers in acquiring skills necessary to maintain careers across all sectors of the industry (film/television/theatre/concerts, etc.)^{258,259,260}

Invest in modernization and accessibility of cultural spaces

Arts organizations and ASOs have advocated for an additional \$54 million in annual permanent funding to the Canada Cultural Spaces Fund and \$500 million in permanent funding to the Green and Inclusive Community Buildings Program to support capital and infrastructure and to make arts spaces sustainable, green, safe, accessible, and modernized^{261,262} with some recommending an investment of \$100,000,000 to fund sustainability upgrades, infrastructure improvements, and climate change mitigation.²⁶³

Increase Operational/Administrative Costs

The Professional Association of Canadian Theatres lobbied for an increase in eligible administrative expenses and allocations in Canadian Heritage funding initiatives (e.g. from 15% to 30%), noting that theatre groups have faced substantial rises in operational expenses, particularly in rural parts of the nation, where administrative costs have reportedly surged by up to 41%. This escalation in operational expenses is significantly affecting the financial stability of theatre organizations throughout Canada, with 38% of these entities reporting a deficit or expressing significant concerns regarding their long-term viability.²⁶⁴

Charity Policy, Incentivizing Giving, and Tourism as Strategy

Charity Policy and Communications

There has been a wave of advocacy directed at shifting the trend toward declining charitable donations in the arts and the charitable sector at-large. Orchestras Canada has suggested that the Government of Canada partner with Canadian charities to increase public awareness about the value of charitable giving, support research on donor motivations, and evaluate the impact of tax incentives for charitable giving.²⁶⁵ Of considerable concern to the sector is the impact of the proposed Alternative Minimum Tax (AMT) changes on charitable revenues, with arts

organizations suggesting the implementation of the proposed AMT be delayed until its impact on charitable revenues is determined.^{266,267}

Most Canadian theatres are not-for-profit and depend heavily on donations, but the charitable tax incentive for donations over \$200 varies significantly across provinces, with Quebec offering the highest at 24% and Ontario the lowest at 11%. The Canadian Actor's Equity Association (CAEA) noted provincial inequities in charitable tax incentives, suggesting a Federal Charitable Tax Incentive system that would standardize and increase the tax incentives for donations nationwide.²⁶⁸

A coalition of organizations has advocated to increase Canadian Heritage's Endowment Incentives component of the Canada Cultural Investment Fund (CCIF) by \$20 million annually for existing performing arts recipients. The Endowment Incentives program offers a public incentive which has historically matched each \$1 of private donations to endowments, with up to \$1 in public funding to drive key fundraising efforts. Increasing the fund has been endorsed by a coalition of legacy organizations, notably the nation's major symphony orchestras, ballet companies, opera companies, large budget theatre companies (Shaw Festival and Stratford Festival) and larger cultural institutions (i.e. Banff Centre, Confederation Centre for the Arts, Centre Segal for the Performing Arts).^{269,270}

In addition to specific measures to incentivize charitable giving, other recommendations have been directed at the labour force. Business for the Arts recommended offering tax benefits for volunteers and integrating strategies for employing newcomers; expanding support for training and capacity-building; investing in leadership development pathways, and providing student debt relief for graduates working in the NFP sector; improving the alignment of existing youth employment programs, such as Young Canada Works and Canada Summer Jobs to better meet the needs of the sector; and retooling the EI system to include gig and self-employed creative workers.²⁷¹

Tourism as Strategic Investment

Recommendations have been made to implement a tax credit to encourage individuals to buy tickets to Canadian theatre productions and for the Government of Canada to invest in a public campaign that promotes Canadian live performances as a tourist experience and to encourage audience return.²⁷² Provincial investments in local tourism (Staycation Ontario, New Brunswick's Invitation Strategy, etc.) have modeled the overt integration of arts into tourism development.²⁷³

Tax Credits for Canadian productions

Citing foreign investment in Canada's film and television industry as a source of job creation, IATSE and the Canadian Actor's Equity Association have recommended implementing a similar tax credit system for the live performance sector. The unions have suggested that a tax credit scheme would incentivize attract large-scale productions, create jobs, and yield economic returns.²⁷⁴

Income Supports for Individual Artists

Universal Basic Income

To address issues of job retention, precarity, and access to the industry for emerging and early-career workers, Canadian Actor's Equity, IATSE, Orchestras Canada, Association acadienne des artistes professionnel.le.s du Nouveau-Brunswick (AAAPNB), and La Fédération culturelle canadienne-française (FCCF) have advocated for the implementation of a universal basic income project.^{275,276}

EI Expansion

There has been a robust call to implement an employment insurance system for self-employed artists. The current system, which allows self-employed workers partial opt-in for Special Benefits but excludes them from Regular Benefits has led to the proposition of a transitional phase where all workers can access benefits, ensuring comprehensive coverage while maintaining contribution-based eligibility.^{277,278}

In reforming the employment insurance system, the Association acadienne des artistes professionnelles du Nouveau-Brunswick (AAAPNB) noted that the following principles should be taken into account

- EI benefits should be transferable and cumulative, should be connected to an individual, and should collect contributions from all types of work (paid employment, self-employment, artistic and non-artistic);
- The threshold of eligibility for EI should be low enough for artists to qualify;
- Self-employed artists should not be required to pay both the employer and employee contributions to access regular benefits; and
- Invisible work should be factored into the calculation of both fees and benefits. Invisible work includes all the time spent on activities that inevitably precede the presentation of a final artistic product, including preparation and training, research and creation, networking, dissemination, and promotion of the artwork.²⁷⁹

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