



THEATRE CORONAVIRUS PREPAREDNESS AND IMPACT REPORT—MARCH 2020

On March 13, 2020, one week after TCG conducted a “Coronavirus Preparedness for Theatres” webinar and one day after Broadway theatres went dark as a result of the growing COVID-19 pandemic, TCG launched a snapshot survey of our professional, not-for-profit member theatres to capture information about their preparedness for and early impact of the pandemic. The COVID-19 situation is rapidly developing, and much has changed even in the short time since this survey closed. TCG plans to survey our members regularly over the coming months, as part of our efforts to provide support and resources to our constituents and to advocate with the federal government, funders, and other stakeholders on behalf of the institutions, administrators, technicians, and artists who comprise the diverse theatre field that contributes so much to our country.

In TCG’s March 2020 Coronavirus Preparedness and Impact Survey, we aimed to capture the following:

- **Preparedness:** How prepared did theatres feel to deal with things like decisions about performance cancellations, communication with audiences and other external stakeholders, and remote working as a result of the coronavirus?
- **Already cancelled activities:** Had theatres already cancelled performances, education programming, fundraising events, and other activities due to the coronavirus and, if so, how far out had those cancellations extended?
- **Cancellations being seriously considered:** What types of activities (performances, education programming, fundraising events, etc.) were theatres seriously considering cancelling due to the coronavirus, and how far out were the activities being considered for cancellation scheduled to take place?
- **Performance alternatives:** In the face of restrictions and/or cancellations due to the coronavirus, were theatres exploring/pursuing performance alternatives and, if so, what kinds?
- **Out-of-town artists:** Were theatres encountering challenges specifically related to out-of-town artists as a result of the coronavirus?
- **Compensation of those affected by cancelled performances:** Did theatres anticipate being able to compensate artists, production staff, etc. involved with cancelled performances and, if so, to what extent?
- **Advocacy needs:** In what areas did theatres hope TCG might advocate on behalf of the field?
- **Audience behavior:** Prior to any cancellations, were theatres seeing changes in audience behavior as a result of the coronavirus and, if so, to what extent?
- **Lost revenue:** How much revenue from ticket sales, other earned revenue streams (e.g., rentals, concessions, education programs), investment income, fundraising event income, and contributed income had theatres already lost due to the coronavirus, and how much revenue did they project they would lose by the end of June 2020?
- **Additional expenses:** Had theatres already incurred additional expenses as a result of the coronavirus (from cleaning supplies, support for remote working, lost deposits, etc.), and by what percentage did they project their expenses would increase through the end of June 2020 as a result?
- **Immediate concern:** What was the greatest immediate concern for theatres?
- **Longer-term concern:** What was the greatest longer-term concern for theatres?

Theatres were also invited to share [additional comments](#) related to coronavirus preparedness and impact.

One hundred sixty-eight theatres (roughly one third of TCG’s Member Theatres) participated in this survey. Participants included theatres in thirty-nine states and of all budget sizes: Group 1 (annual expenses of \$499,999 and below) = 35 theatres, Group 2 (\$500,000 - \$999,999) = 29 theatres, Group 3 (\$1,000,000 - \$2,999,999) = 47 theatres, Group 4 (\$3,000,000 - \$4,999,999) = 18 theatres, Group 5 (\$5,000,000 - \$9,999,999) = 20 theatres, and Group 6 (\$10 million and above) = 19 theatres.

Key findings from TCG’s March 2020 Coronavirus Preparedness and Impact Survey include:

- **The majority of theatres had already made hard decisions to cancel performances and other activities.** Eighty-eight percent of participants had cancelled performances that had already been scheduled to take place and/or were scheduled to take place in the coming weeks, 58% had already cancelled education programs, and 38% had already cancelled their annual gala.

- **Revenue losses will be substantial.** Theatres are not only losing income from ticket sales but also from other revenue streams such as rentals and investment income, and their usual fundraising efforts are severely compromised. In respondents' earliest projections, the lost revenue through June 2020 totals nearly \$120 million. As stay-at-home orders have extended and expanded, the true lost revenue will no doubt prove to be much greater for those theatres and for the field as a whole. We estimate that for the larger universe of U.S. professional not-for-profit theatres (1,855 theatres per TCG's [Theatre Facts 2018](#)), total revenue loss through June 2020 alone will exceed \$500 million. These losses will have a dire financial effect on individual theatres and, in turn, on their communities and the U.S. economy as a whole.
- **Theatres are deeply concerned about the livelihoods and wellbeing of their artists, staff, and contracted personnel.** Fifty-six percent of respondents had committed to some kind of compensation for artists, production staff, etc. involved with cancelled performances. The remaining theatres expressed a desire to do so but could not or were not yet sure they could in the face of lost revenue. Theatres were trying to avoid furloughing or laying off personnel but feared they would be unable to do so.
- **Theatres are invested in maintaining ties with their communities.** Sixty-seven percent of respondents were exploring/pursuing performance alternatives including streaming of already existing content, creation of new content for streaming, online activities related to artist development and engagement, virtual arts education work, and virtual donor engagement and cultivation activities.
- **Theatres need immediate and ongoing relief and support.** With limited cash and no revenue, many theatres are scared for the survival of their organizations. They need flexibility in the use of existing grants and significant additional support from the government, foundations, corporations, and individuals both for the short-term and beyond. Theatres are concerned about the pressure on the funding community, since every arena is being affected by the pandemic, and they worry about where the arts will fall in funding priorities.
- **It is extremely difficult for theatres to plan when there is ever-changing information and uncertainty about how and when the pandemic will end.** Theatres fear that staff reductions will make it difficult or impossible to ramp back up when they are allowed to resume production. There is also a lot of concern about how health and financial considerations will impact audiences returning. While all theatres are worried about making it through this season, many are equally if not more concerned about next season.
- In spite of everything, **theatres are inspired by the creativity and generosity of the people directly associated with their organizations, in their local communities, and in the larger theatre community.**

The full report from TCG's March 2020 Coronavirus Preparedness and Impact Survey begins below. Theatres were not required to respond to every survey question, so percentages in this report are based on the number of respondents to the particular question rather than the total number of participants, and the data were accepted "as is."

PREPAREDNESS

- **95%** of respondents said they **felt prepared or somewhat prepared** to make **decisions about cancelling performances, programs, etc.**
- **73%** of respondents said they **felt prepared or somewhat prepared** to handle **insurance issues (business, liability, etc.).**
- **94%** of respondents **felt prepared or somewhat prepared** to handle **external communication (audiences, funders, other stakeholders).**
- **83%** of respondents **felt prepared or somewhat prepared** to **continue work if a member of their office staff gets sick.**
- **57%** of respondents **felt prepared or somewhat prepared** to **continue work if someone onstage or backstage gets sick.**
- **82%** of respondents **felt prepared or somewhat prepared** to **continue running operations if their office has to close entirely.**

	Cancellation decisions	Insurance	External communication	Staff illness	Onstage or backstage illness	Working remotely
<i># Respondents</i>	167	162	166	165	165	166
Prepared/have a plan	49%	40%	39%	39%	28%	45%
Somewhat prepared/actively formulating a plan	46%	33%	55%	44%	29%	37%
Not prepared/talking about formulating a plan	5%	11%	5%	11%	10%	13%
Not prepared/don't know where to start	1%	9%	1%	5%	7%	4%
N/A	0%	7%	0%	2%	26%	1%

ALREADY CANCELLED ACTIVITIES

- **88% of participants** reported that they **had already cancelled performances of productions in all spaces**. Of those, 61% had cancelled performances that were already supposed to have taken place, while 35% had already cancelled performances scheduled to take place more than six weeks out.
- **45% of participants** reported that they **had already cancelled performances of productions in select spaces**. Of those, 67% had cancelled performances that were already supposed to have taken place, while 29% had already cancelled performances scheduled to take place more than six weeks out.
- **59% of participants** reported that they **had already cancelled other types of performances (e.g., readings)**. Of those, 52% had cancelled performances that were already supposed to have taken place, while 22% had already cancelled performances scheduled to take place more than six weeks out.
- **78% of participants** reported that they **had already cancelled rehearsals**. Of those, 63% had cancelled performances that were already supposed to have taken place, while 22% had already cancelled rehearsals scheduled to take place more than six weeks out.

	Performances in all spaces	Performances in select spaces	Other types of performances	Rehearsals
<i># Respondents</i>	148	75	99	131
Already supposed to have taken place	61%	67%	52%	63%
Scheduled to happen within the next two weeks	63%	60%	58%	55%
Scheduled to happen 2 to 4 weeks from now	58%	59%	60%	56%
Scheduled to happen 5 to 6 weeks from now	36%	36%	35%	37%
Scheduled to happen further out than 6 weeks	35%	29%	22%	22%

- **58% of participants** reported that they **had already cancelled education programs taking place at the theatre**. Of those, 71% had cancelled performances that were already supposed to have taken place, while 28% had already cancelled education programs at the theatre scheduled to take place more than six weeks out.
- **58% of participants** reported that they **had already cancelled education programs taking place outside of the theatre**. Of those, 69% had cancelled education programs taking place outside of the theatre that were already supposed to have taken place, while 30% had already cancelled programs scheduled to take place more than six weeks out.
- **38% of participants** reported that they **had already cancelled their annual gala**. Of those, 17% had cancelled a gala that was already supposed to have taken place, while 33% had already cancelled a gala scheduled to take place more than six weeks out.
- **49% of participants** reported that they **had already cancelled other types of cultivation events**. Of those, 43% had cancelled cultivation events that were already supposed to have taken place, while 22% had already cancelled cultivation events scheduled to take place more than six weeks out.

	Educ. Progs. at theatre	Educ. Progs. outside theatre	Annual gala	Other cultivation events
<i># Respondents</i>	97	97	64	83
Already supposed to have taken place	71%	67%	17%	43%
Scheduled to happen within the next two weeks	67%	60%	27%	55%
Scheduled to happen 2 to 4 weeks from now	61%	59%	17%	63%
Scheduled to happen 5 to 6 weeks from now	42%	36%	25%	33%
Scheduled to happen further out than 6 weeks	28%	29%	33%	22%

SERIOUSLY CONSIDERING CANCELLATION OF ACTIVITIES

- 62% of participants reported that they were seriously considering cancelling performances of productions in all spaces. **Of those, 75% were seriously considering cancelling performances of productions in all spaces scheduled to take place more than six weeks out.**
- 29% of participants reported that they were seriously considering cancelling performances in select spaces. **Of those, 76% were seriously considering cancelling performances of productions scheduled to take place more than six weeks out.**
- 35% of participants reported that they were seriously considering cancelling other types of performances (e.g., readings). **Of those, 76% were seriously considering cancelling other types of performances scheduled to take place more than six weeks out.**

- 58% of participants reported that they were seriously considering cancelling rehearsals. **Of those, 61% were seriously considering cancelling rehearsals scheduled to take place more than six weeks out.**

	Performances in all spaces	Performances in select spaces	Other types of performances	Rehearsals
<i># Respondents</i>	104	48	58	97
Scheduled to happen within the next two weeks	18%	21%	21%	24%
Scheduled to happen 2 to 4 weeks from now	22%	25%	16%	32%
Scheduled to happen 5 to 6 weeks from now	33%	35%	29%	32%
Scheduled to happen further out than 6 weeks	75%	73%	76%	61%

- 40% of participants reported that they were seriously considering cancelling education programs scheduled to take place at the theatres. **Of those, 75% were seriously considering cancelling education programs held at the theatre scheduled to take place more than six weeks out.**
- 36% of participants reported that they were seriously considering cancelling education programs scheduled to take place outside of the theatre. **Of those, 72% were seriously considering cancelling education programs held outside of the theatre scheduled to take place more than six weeks out.**
- 29% of participants reported that they were seriously considering cancelling their annual gala. **Of those, 88% were seriously considering cancelling an annual gala scheduled to take place more than six weeks out.**
- 29% of participants reported that they were seriously considering cancelling other types of cultivation events. **Of those, 69% were seriously considering cancelling other types of cultivation events scheduled to take place more than six weeks out.**

	Educ. Progs. at theatre	Educ. Progs. outside theatre	Annual gala	Other cultivation events
<i># Respondents</i>	68	60	49	49
Scheduled to happen within the next two weeks	19%	23%	6%	14%
Scheduled to happen 2 to 4 weeks from now	25%	27%	6%	18%
Scheduled to happen 5 to 6 weeks from now	34%	37%	14%	35%
Scheduled to happen further out than 6 weeks	75%	72%	88%	69%

EXPLORING/PURSUING PERFORMANCE ALTERNATIVES

Of the 167 respondents, **67% reported that they are exploring/pursuing performance alternatives.** Examples primarily included live streaming and streaming of captured video. Theatres were most interested in providing opportunities for their artists and in finding ways to stay connected to their audiences. Some theatres planned to offer these options for free, while others were exploring these avenues as a means of generating ancillary income. Several theatres mentioned collaborations with other theatres/local arts groups. Theatres were considering utilizing ways to share existing content as well as exploring ideas for generating new content. Many theatres noted that use of these avenues was dependent on union and/or artist approval.

Examples of performance alternatives included:

- Sharing of existing production content—e.g., archival videos of full productions and performance excerpts
- Creation of new production content—e.g., recording of new small-scale plays; video and audio versions of plays already rehearsed; collaboration with other local arts groups to live-stream performances; producing one show scheduled for summer season to be filmed only; online weekly performances from resident artists; virtual cabarets; and behind-the-scenes webinars and podcasts
- Artist development and engagement—e.g., readings of new plays online; online 24-hour playwriting contests; virtual rehearsals; and live-streamed chats and solo performances with artistic company
- Virtual arts education work—e.g., online readings with teen ensemble; Instagram improvisation exercises for families; online classes; online discussions; replacing education day camps with online camps; and working virtually on a creative project around themes of the youth production that was supposed to be rehearsing
- Donor engagement and cultivation—e.g., virtual gala

CHALLENGES RELATED TO OUT-OF-TOWN ARTISTS

Of the 161 respondents, 36% reported challenges specifically related to bringing artists in from out-of-town. A number of theatres noted that they were not encountering issues only because they had already cancelled productions or were not yet in production.

Cited challenges included:

- Actors and other artists not being able to leave because of travel restrictions or other issues, such as having sublet their apartments with the expectation of being away. Some theatres are allowing these artists to remain in their housing indefinitely.
- Artists choosing not to come out of fear of travel and/or being stuck away from home should a travel ban be instituted
- Cancellation of productions that involved international artist exchanges
- Housing options falling through due to usual housing volunteers being reluctant to open their homes to out-of-town guests
- University-affiliated theatres being subject to university regulations and bans on travel
- Needing to video out-of-town artists for season auditions
- Inability to rehearse/perform due to distancing standards

COMPENSATION OF ARTISTS, PRODUCTION STAFF, ETC. INVOLVED WITH CANCELLED PERFORMANCES

"If contributed revenue remains steady (doubtful), we may be able to compensate artists a portion of lost wages, however, the loss of earned revenue coupled with loss of contributed would make this unlikely. At that point, we will be struggling to keep year-round staff paid/covered by health insurance."

"We rely heavily on (our hourly employees) and feel a sense of obligation to compensate them in some way for upcoming loss of work but (right now we are) just evaluating the entire situation."

Of the 164 respondents, **56% had committed to some kind of compensation for artists, production staff, etc. involved with cancelled performances**; 18% had committed to full compensation, and 38% had committed to partial compensation. Thirty percent of respondents expressed a desire to provide compensation but were not sure they would be able to do so in light of revenue losses, and 13% expressed a desire to provide compensation but knew they would not be able to do so.

Responses made it very clear that theatres are deeply concerned about the impact of cancellations on their staff and artists, and that they are doing what they can to provide compensation in the face of serious cash flow problems. Those providing some kind of compensation reported doing so for anywhere from 2 weeks to up to 3 months. Some of those theatres were compensating all personnel, while some reported that they need to limit compensation to core personnel. Some theatres reported compensating artists who had already begun work but being unable to compensate those whose productions had not yet begun, while others reported that they would be honoring all of their agreements. A number of theatres specifically noted a commitment to finding ways to maintain health care payments, and some reported that they are applying for loans to cover artists' and staff's salaries and fees. Comments also reflected the wide range of personnel affected by cancellations, including artists in productions, teaching artists, administrative staff, technical production staff, box office and front-of-house personnel, and more.

ADVOCACY NEEDS

"We need money to support basic operation immediately. No money is coming in right now."

We are committed to paying our staff, even if they are unable to do their jobs in the weeks ahead, as rent still needs to be paid and people still need to eat. Government and Foundation relief is necessary if we are to avoid layoffs by the end of this year."

"Advocate for care for artists, arts workers, and the industry. We are responsible for so much money being generated that serious long term impact must be mitigated for the good of the culture economy. We are also the bell weather for society - when we are up and running again, everything will be seen as being fine."

Seventy theatres shared areas in which they felt TCG might advocate on behalf of the field. The most pressing themes included:

Cash and funding

- Encouraging foundations and funders to convert programming grants to operating support for this year and possibly next
- Timing flexibility and relaxation of restrictions on support from funders
- Emergency funds from foundations, government, etc.

- Advocacy for arts organizations to be included in federal stimulus package
- Super-low-interest loans from foundations, etc.
- Field-wide bridge funding from foundations
- Federal grants to cover loss in ticket revenue
- Help with identifying sources for assistance funds beyond government programs
- Lobbying for business interruption insurance coverage
- Including resident theatres/private not-for-profits in the definition of small businesses eligible for loans and recovery grants
- Rent relief

Artist support

- Encouraging unions to adjust health coverage qualification minimums
- Encouraging unions to relax rules on what activities artists can engage in
- Encouraging theatres with reserve funds and/or other capacity to support artists
- Advocating for theatres getting money to help pay artists as well as employees
- Guaranteed and expanded unemployment insurance for artists

Media usage

- Encouraging unions to relax rules on use of video and other media
- Sharing resources being used for digital distribution

Communication

- Sharing our story with public and private supporters
- Aggregating and sharing data from the industry
- Helping the government understand the specific impact on not-for-profit organizations, which won't benefit from things like tax credits
- Communicating how essential the field is to the wellbeing of the country, including its economy

CHANGES IN AUDIENCE BEHAVIOR

The majority of respondents reported seeing some degree of changes in audience behavior prior to any cancellations by the organization.

	Cancellation of Tickets	Exchanging of Tickets	Concerned Calls/Emails
<i># Respondents</i>	<i>138</i>	<i>128</i>	<i>149</i>
Not at all	19%	16%	7%
Small amount	37%	34%	44%
Moderate amount	26%	27%	26%
Significant amount	18%	23%	24%

Interestingly, some theatres had been seeing an increase in ticket sales due to cancelled trips and other activities. Many comments, however, reflected near or total lack of sales for current and upcoming productions for this season, as well as significant drop-offs in subscription renewals for next season. On a positive note, some theatres reported a strong response from individuals to requests to donate their tickets, and others expressed receiving “tremendous compassion and support from our audiences.”

LOST REVENUE

Participants were asked a series of questions related to lost revenue:

REVENUE ALREADY LOST DUE TO THE CORONAVIRUS

- For the 113 theatres that provided a figure for **lost revenue from ticket sales**, the average amount already lost was **\$172,265**.
- For the 87 theatres that provided a figure for lost **other earned revenue (e.g., rentals, concessions, classes and other education programs, etc.)**, the average amount already lost was **\$36,980**.
- For the 39 theatres that provided a figure for **lost investment income**, the average amount already lost was **\$486,053**.

- For the 57 theatres that provided a figure for **lost fundraising events income**, the average amount already lost was **\$122,273**.
- For the 48 theatres that provided a figure for **contributed income**, the average amount already lost was **\$90,858**.

PROJECTED REVENUE LOSS DUE TO THE CORONAVIRUS BY THE END OF JUNE 2020

- For the 148 theatres that provided a projected figure for **lost revenue from ticket sales** by the end of June 2020, the average projected loss was **\$396,594**.
- For the 126 theatres that provided a projected figure for **lost other earned revenue (e.g., rentals, concessions, classes and other education programs, etc.)** by the end of June 2020, the average projected loss was **\$83,143**.
- For the 51 theatres that provided a projected figure for **lost investment income** by the end of June 2020, the average projected loss was **\$385,859**.
- For the 97 theatres that provided a projected figure for **lost fundraising events income** by the end of June 2020, the average projected loss was **\$167,213**.
- For the 96 theatres that provided a projected figure for **lost contributed income** by the end of June 2020, the average projected loss was **\$153,768**.

In total, the projected lost revenue through the end of June 2020 for the responding theatres is nearly \$120 million. We note that many theatres did not feel ready to provide projections for some or all income areas. Based on those early projections, though, we estimate that for the field as a whole—an estimated 1,855 U.S. professional not-for-profit theatres, according to TCG’s [Theatre Facts 2018](#)—the total revenue losses through June 2020 alone will exceed \$500 million. These losses will have a dire financial effect on individual theatres and, in turn, on their communities and the U.S. economy as a whole.

PROJECTED % OF REVENUE LOSS FOR CURRENT FISCAL YEAR

- For the 140 responding theatres, the average projected **earned revenue losses as a % of budgeted earned revenue (excluding investment income)** for the current fiscal year were **26%**.
- For the 58 responding theatres, the average projected **investment income losses as a % of budgeted investment income** for the current fiscal year were **16%**.
- For the 110 responding theatres, the average projected **contributed income losses as a % of budgeted contributed income (including fundraising events)** for the current fiscal year were **18%**.

Theatres are being impacted not only by lost ticket sales, but also by losses in revenue from education programs, rentals, concessions, advertising, etc. Also, many theatres, particularly larger ones, rely on investment income, which has been severely affected by the market downturn. Theatres noted that “refunds are as much a danger as lost future income,” and some projected that ticket pricing will need to be much lower when business resumes in order to regain the audience.

Many theatres expressed great concern around contributed income, but they felt it was too early to gauge the impact. The one area in which theatres were clear about impact was the need to postpone or cancel their annual gala, which one theatre referred to as “catastrophic.” Others noted that this is normally their busiest fundraising period and that their efforts were already being much less successful due to shelter-in-place orders. Comments raised many questions, including: How will foundations’ capacity to offer support be impacted? Will foundations direct their support to hard-hit sectors other than the arts instead? Will individual support increase, or will the economy/market downturn severely diminish it? Will grants be cancelled rather than be delayed? Will capital campaigns need to be halted, and how will that impact organizations’ sustainability?

In both the earned and contributed income comments, fears were expressed that next year would be even harder than this year.

ADDITIONAL EXPENSES

Participants were also asked about additional expenses related to COVID-19:

EXPENSES ALREADY INCURRED DUE TO THE CORONAVIRUS

- For the 82 theatres that provided a figure for expenses incurred from **cleaning-related supplies and personnel**, the average amount already incurred was **\$2,818**.
- For the 59 theatres that provided a figure for expenses incurred related to **paid sick leave time and support for remote working**, the average amount already incurred was **\$9,713**.
- For the 63 theatres that provided a figure for expenses incurred related to **deposits/fees for space rentals, events, travel, etc.**, the average amount already incurred was **\$9,660**.

PROJECTED % OF INCREASE IN BUDGETED EXPENSES FOR CURRENT FISCAL YEAR DUE TO THE CORONAVIRUS

- For the 85 responding theatres, the average estimated **increase in budgeted expenses** for the current fiscal year due to the coronavirus was **7%**.

Comments reflected serious concerns about theatres' abilities to pay expenses in the face of limited cash flow. While many production-related expenses were decreasing or being eliminated due to cancellations, some theatres reported expenses related to technology for performance streaming/virtual engagement, in addition to technology for enabling remote working. Theatres highlighted that cancelling productions does not eliminate operational expenses. With income so diminished, this leaves many theatres facing the difficult decision of furloughing and/or laying off personnel. Some theatres noted that most of their upcoming expenses will be related to buying out contracts and employment agreements.

GREATEST IMMEDIATE CONCERN FOR YOUR ORGANIZATION

The greatest immediate concern by far: CASH. Theatre leaders expressed deep concerns about the financial, physical, and mental health of staff and artists. They are struggling with how to balance their human feelings and moral values with their responsibility to their organizations and the harsh financial realities they are facing. Theatres are wondering how they can stay connected to audiences and whether those audiences will come back. Many wonder whether they can hold on long enough to make it through to the point at which they can start back up, and they question how they will be able to ramp up if they are forced to reduce their staff. Many listed the stress from the uncertainty of what will happen and when things will end; they struggle with how to make decisions in light of that uncertainty.

Select comments:

"We are facing an existential crisis and trying to figure out how much we can reduce expenses, how well we can support staff and artists, and what we need to do to make it through to a time when we can stage a play again."

"Keeping artists and staff fully paid during this trying time. Most of them had 'back up' or supplemental jobs in the service industry. These have disappeared overnight. My people, my ensemble artists, have no other resources to call on. They have given their lives to this work. I must help them keep their rent paid and food on the table. If I lose them, I lose years of institutional knowledge and artistic expertise."

"Determining cash flow and having more concrete information about economic relief."

"Staying connected to our artists and our community at a time when we cannot come together."

"Soul safety of people who need to be together in community to process what's happening but are forced to be in isolation instead."

"When will it be safe to program things? We need to plan now but have no idea when we will be able to open our doors."

"Losing our lease. Not paying our staff. Going bankrupt."

"Losing team members either due to anxiety or illness."

"Loss of audience and our organizational culture."

"Stabilizing our artists. They're always on the edge, financially, and they're losing countless gigs right now. We're trying to provide as much severance as possible, without damaging our chances to survive as an organization. Ditto for my younger staff...who don't have much cushion."

"Without additional financial support and relief from donor and funder restrictions, we will be unable to pay the artists who would be working on projects with us... and that loss for them could be catastrophic (when combined with the other losses from theatres closing doors and other service orgs and restaurants cutting back on overhire staff). We are looking to immediately focus on what we can do to increase the funding we need to ensure all artists we would otherwise have hired are paid for the next three months. In the meantime, we are paying all staff to continue, regardless of whether they are working remotely or able to do the full workload."

"Our immediate concern is for our staff. We can't afford to do more than give them a bonus and direct them to unemployment options. We have enough in savings to support core staff for about a month and a half with the possibility of cutting back pay. After that, we're not sure how to keep going."

"The continued health of our staff and patrons. Lots of older and immune compromised people in our core audience."

"Our communications and fundraising efforts in the immediate future to stay on-brand, positive, and properly convey the severity of the circumstance."

GREATEST CONCERN FOR YOUR ORGANIZATION LONGER-TERM

Theatres expressed long-term concerns related to the wellbeing of staff and artists; the return of audiences; funding capacity and priorities; loss of reserves and incurring of debt; and much more. They are concerned about the survival of their organizations, the theatre ecosystem, and the art itself, and they are questioning what the cost of that survival might be. Theatres are struggling with the uncertainty of what the future holds, and what steps they can take in the face of that uncertainty.

Select comments:

“Not knowing what the future holds. If this is a short-term issue, we'll be fine. If this is a long-term issue, we will have to rethink everything.”

“Ability to function in an altered way.”

“Ability to bring audiences back to the theatre following this — what are going to be the long-term effects on an industry already competing with on-demand entertainment? How do we serve diverse artists and populations who may be some of the hardest hit?”

“All of the strategic plans set in place for the current year are out the door, and we will have to make rushed and not fully equipped decisions.”

“Audience loss. If we have to rebuild our audience base, that will have the longest term impact on the theatre and its health.”

“Ensuring that we secure enough funding to get us through this difficult time and to keep pushing forward.”

“Can we survive this without having to let go of people/support all our artists?”

“Cash flow and ensuring that we are able continue operations if this situation continues past June.”

“Changes in audience comfort level being together in confined spaces.”

“Digging out of the debt that we undoubtedly will fall into.”

“Fear.”

“Financial recovery. Where the cultural sector and our organization will fall in the “pecking order” of philanthropy; will more funds be infused into health and human services, limiting resources, or will families, foundations, and corporate entities spread their support to a more balanced blend of organizations?”

“Going out of business.”

“Having the resources to prepare for future seasons if all reserves are spent.”

“Regaining the momentum and increase in subscriptions and single tickets we had started to see.”

“If we can't pay rent, our landlord may decide we aren't worth the investment anymore.”

“If we do not weather the immediate threat to the organization and the community, there may not be a community of artists to collaborate with when the immediate threat is over.”

“If we survive, the question will be about staff and how well we were able to survive with our community intact. This community extends to the many teaching artists and community organizations we work with.”

“We worry about the small business in the community that this live performance ecosystem has created.”

“The unknowns are remarkable.”

“With the long-term projections for this pandemic, we're talking seriously about shutting down completely for FY21 in an effort to prevent additional losses that a company our size is incapable of weathering.”

“Literally, the survival of the company.”

“My concern is that there won't be a longer term to plan for.”

“Slow return of elderly patrons (over 65, about 40% of our audience) to public gatherings even after restrictions lifted - major audience damage to next season, too. We'll be back, but we'll also be set back.”

“Organizationally, we'll survive, but at what cost to the culture and family that has built the company over many years?”

“That gathering in community to have a common experience will become synonymous with danger and contagion.”

“That the work we have achieved in the last three years will be set back by this challenge and we'll have to do it all over again.”

“Are we a theater company if we're not producing?”

“That we will lose momentum for a capital campaign we were about to launch which will doom us to a slow death as rents become unsustainable.”

“The fact this will affect individual and institutional giving for YEARS to come and that those repercussions will further damage an already incredibly under-capitalized field.”

“Burnout of our artists and core staff. The resurgence of the viral outbreak in the Fall and Winter also (stopping) our programming later in the year.”

“Ticket credits on account...this means we're going to have to reduce our budgeted expenses next year by approximately the cost of one production while still doing the same number of productions.”

“Touring internationally and nationally.”

“Very big possibility that we will deplete all of our reserves and go into debt. How will we get out?”

“Because this will hit so many organizations, the demand on philanthropy will be huge. And given the markets, we fear that the ability of donors to give in large amounts will be reduced.”

“The revenue losses will create an immediate reduction in staff, which may take years to rebuild.”

“We will not be able to emerge, as a society, from this crisis for 12 to 18 months. If that is the case, I fear most of us will close.”

ADDITIONAL COMMENTS RELATED TO CORONAVIRUS PREPAREDNESS AND IMPACT

Select comments:

“As we look to heading into rehearsal, how do we rehearse a play without touching? How do we gauge the health of our artists to keep others safe?”

“I don't feel like we could have been prepared for this, knowing the overall thin margins arts orgs operate on.”

“Insanely stressed and scared.”

“Like all theatres we are actively raising emergency funds. We will be borrowing from our endowment to help keep our staff. Protecting our staff is a priority of our theatre.”

“Losing regular audience, who might get out of the habit of attending live theatre.”

“We will likely weather this storm, even if it lasts through the end of the season. I am concerned as much or more about my colleagues who do not have the financial cushions we have in place.”

“We are making the hardest decisions of my career in order to ensure that we can return to play again. No one is immune.”

“I've found great inspiration and comfort in the theatre community during this time, as I always do. Other managing directors have been very open and willing to share what they're thinking and doing. There's a strong feeling that we're all in this together. And I do believe that some creative solutions for how we make and share art will emerge out of this. Constraint breeds creativity. But I also know we have a tough road ahead. I'm concerned for our artists and organizations, in the short-term and long-term.”

“We continue to be overwhelmed at the brilliance of our fellow artists who are creating inventive work and inspiring us daily.”

“There is still so much unknown about this next few weeks and months, something that we could not have fully prepared for. But taking it day by day, with the full intention of getting back to our mission driven work of creating a safe harbor for adventurous work.”

“We are working closely with multiple parties to assist us in making informed decisions and securing maximal safety for artists and audiences. We are also trying to parse fact from fiction when it comes to formulating our responses to this virus.”

“We are working in a rapidly changing landscape: alternative plans and schedules are created only to need to change due to updated governmental mandates. It's a situation unlike anything we've encountered.”

“I think what this has brought to light is that the way in which nonprofit theater works has got to change - for example, the fact that none of us have a steady stream of income, unlike our social service nonprofits that are funded annually by the government. I hope this is a wake-up call to all of us that we have to change, if we're going to survive.”

For questions about this report, please contact Ilana B. Rose, associate director of research & collective action, at irose@tcg.org.

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For more resources related to the theatre field and COVID-19, please visit the TCG website at: <https://www.tcg.org/ResearchAndResources/DisasterManagement/Resources/Coronavirus.aspx>

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