

May 13, 2021

COVID-19 IMPACT SURVEY - ONE YEAR ON.

Over the past month, PACT reached out to theatre companies across the country with a survey that was answered by 132 companies. Last year, PACT conducted a similar wide-scale survey to find out how your organizations have been affected by COVID-19. A year after the first shutdown, and as the vaccines roll out across the country, PACT wanted to find out where theatres stand so the sector can start planning for a safe re-opening. This document also intends to support the government in understanding the type of support needed for an effective recovery and rebuilding.

ECONOMIC IMPACT

The impact of COVID-19 on the theatre sector, looking specifically at:

- Canceled and postponed productions: the majority of the respondents (87%) had canceled more than 3 productions in the last year, the other 13% have canceled between 1-2.
- Canceled and postponed community and educational events: this number has remained constant since the last survey, the majority of respondents have canceled more than 3 events due to COVID-19.
- Layoffs: The number of layoffs remains constant as well. The respondents have at laid off at on average 10 staff members. When asked for the percentage, some companies have laid off up to 90% of their staff.
- Pay cuts: The number of staff that has taken a pay cut since March 2020 increased by 10% since our July 2020 survey.

Anticipated revenue losses, including:

- Canceled productions: the average revenue loss compared to pre-pandemic revenue is 56%.
- Revenue loss from other sources (rental spaces, cafes/bars, etc.): companies have lost an average 39% of their revenue due to the closure of rental spaces.
- Canceled programming (such as summer camps, educational programming, etc): this line of revenue is down by 34%, on average.

- Almost 57% of companies were not able to meet their fundraising target for the previous year (March 2020- March 2021).

ACCESS AND IMPACT OF GOVERNMENT SUPPORT

During our survey in July 2020, we asked our members which of the federal government programs they had accessed. We found that the Canada Emergency Wage Subsidy (CEWS) and Emergency support through Canadian Heritage and Canada Council for the Arts were the most accessed and impactful to our members. We also asked them (anecdotally) if their artists and staff have been able to access the Canada Recovery Benefit (CRB), with almost 70 respondents saying yes. A summary of results below:

FEDERAL EMERGENCY SUPPORT PROGRAM	July 2020	April 2021
Canada Emergency Wage Subsidy (CEWS)	83.15 %	82.89%
Canada Emergency Business Account (CEBA)	44.94 %	57.89%
Canada Emergency Commercial Rent Assistance (CECRA)	13.48 %	-
Canada Emergency Rent Subsidy (CERS)	-	43.42%
Canada Council for the Arts – Digital Fund	13.48 %	9.21%
Canada Council – Advance of your grant money	69.66 %	
Phase 1: Emergency relief fund from Canada Council/Heritage Canada	74.16 %	
HASCAP	-	1.32%
Canada Council - Core Funding	-	60.53%
Canada Council - Project Funding	-	19.74%
Canadian Heritage Recovery Funding	-	34.21%

The majority of respondents (79% in April 2021 and 88% in July 2020) also expressed that they would like to see CEWS continued, and this was also the most repeated recommendation we received from them on our second survey in September-October when we asked members what the government can do to support them. Our members were grateful for the increase back up to 75% for CEWS, announced in the Fall Economic Statement, and we welcomed the announced extension in Budget 2021. However, Budget 2021 also proposes the gradual decrease in the subsidy rate, and this might impact the sustainability of some organizations. We know the government is open to discussions around the parameters, and PACT can share what we are hearing from theatre companies and share ideas.



Theatre companies were also asked when would their organization feel comfortable reducing emergency supports after reopening, the majority (44.12%) agreed on one year, 20.59% after three months, and 35.29% do not know.

IMPACT ON PRODUCTION, AUDIENCE ENGAGEMENT, AND REOPENING

- Most companies will need a minimum of two months to have a show ready once they are allowed to resume activities. Some companies noted that this will depend on when in their planning cycle the permission to reopen is given. Additionally, they stressed that certainty from governments is needed to assess how much time they need to prepare productions for reopening.
- Organizations were asked what resources or information would help formulate a re-opening plan, and many expressed the need for clear government and public health guidelines, best practices protocols, and rapid testing.
- Many companies continue to explore digital formats to engage with their audience, as well as smaller-scale productions.
- The majority of companies (68%) continue to be concerned or greatly concerned about bringing an artist to their theatre from another province. Similarly, 57% expressed concern about bringing artists from outside Canada once allowed to reopen.
- 70% of respondents are concerned about rehearsing and performing scenes that cannot be completed with social distancing or wearing PPE.
- 79% of companies are concerned that their audiences will not be able/want to return until Canada has reached herd immunity/critical vaccination level.
- To reopen, companies will have to incur additional costs for opening their venues (increased cleaning, infection mitigation, training, etc.). Respondents estimate that these additional costs range between \$5,000 and \$300,000. However, many agree that it is difficult to quantify due to the uncertainty of how reopening looks like.
- These are the type of expenses companies need support with:

Digital infrastructure	60.56%
Physical infrastructure (adapting theatres to safely re-open)	50.70%
Personal protective equipment	60.56%



Staff training	57.75%
Salaries and wages	74.65%
Contract and artist fees	69.01%
Marketing costs (to reassure audiences that it is safe to come back)	81.69%

