Literature Scan | *August 2024*

Curtains Up: Critical Factors Influencing Theater Resiliency

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Curtains Up: Critical Factors Influencing Theater Resiliency

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Executive Summary

- Before the COVID-19 pandemic, many U.S. theaters, particularly nonprofit theaters, were already experiencing financial challenges. The challenges were the result of declines in subscribers, corporate donations, and grants—coupled with ever-increasing costs to produce shows. In addition, theater staff, repertory, and casting often failed to reflect the diversity of their communities.
- The COVID-related shutdown of all entertainment venues in March 2020 cut off theaters' financial lifeline of paying audiences. The murder of George Floyd in the same month sparked nationwide protests of racial injustice, forcing U.S. theaters also to reexamine their historical practices.
- While short-term federal emergency relief programs provided a means for some theaters to remain solvent and pay their employees, theaters are looking for practical solutions to ensure their long-term viability.

The following are five broad strategies and exemplary practices that theaters employed to survive the pandemic. Many of these practices have been continued since the reopening of theaters.

1. Leverage Technology

2. Provide Alternative and Tailored Ticket Models

3. Curate Programming and Provide Experiences to Connect with Existing and New Audiences

4. Consider Alternative Administrative Models

5. Improve Theater Organizational Culture and Climate

1. Leverage Technology

- ***Offer digital performances to broaden the audience base.*** Digital performances (e.g., streaming) may reduce barriers to accessing live theater and diversify audiences, particularly for persons of color, individuals with disabilities, and those with children.
- ***Use online ticket ordering and other systems to make data-driven decisions.*** Online ticket ordering systems and other data systems offer theaters an opportunity to gather important information on subscribers, ticket purchasers, individual donors, and representatives of foundations and local businesses. Theaters can harness these data for strategic marketing purposes and to implement data-driven theater operations.
- ***Go paperless to reduce waste and save on costs.*** Digital programs and other online theater community spaces can reduce physical waste and lower costs, such as printing.

2. Provide Alternative and Tailored Ticket Models

- ***Explore flexible subscription models.*** Offering ticket models beyond traditional subscription and single-ticket options can provide greater value for consumers and offer them greater flexibility to customize theatergoing packages (e.g., multiple shows, parking, dining).

- ***Offer ticket discounts for youth and young adults.*** Theaters may be able to cultivate the next generation of theatergoers by offering discounted tickets to younger audiences.
- ***Create digital lotteries for tickets.*** The longstanding practice of offering a lottery for tickets can be administered digitally, providing an easy-access opportunity for prospective audience members to win substantially discounted tickets.

3. Curate Programming and Provide Experiences to Appeal to Existing and New Audiences

- ***Adopt a proactive marketing strategy that harnesses the power of social media***. Theaters should take a proactive approach to "selling their own product" by communicating with their audiences early and often. Leveraging social media platforms such as TikTok and Instagram can be a powerful, low-cost marketing strategy to engage with audiences.
- ***Show value by offering an experience that audiences can't get at home.*** Theaters should clearly communicate and emphasize the perceived value they offer audiences (e.g., enjoyable and exclusive experiences in a social setting) while mitigating and deemphasizing the perceived costs of attending (e.g., monetary cost of the event including tickets, childcare, parking).
- ***Find the right balance between productions that are familiar and novel.*** Theaters can curate a season that offers productions of well-known favorites with broad appeal and other thought-provoking productions that speak to the theater's mission.

4. Consider Alternative Administrative Models

- ***Nonprofit theaters can measure success using mission-aligned metrics.*** Nonprofit theaters may reimagine how they measure success beyond finances and artistic endeavors. They may adopt education- and community-oriented metrics that assess their social value.
- ***Try distributed leadership models.*** Theaters can explore distributed leadership models where management is shared among a larger group of individuals instead of the traditional two-person model of an artistic director and executive director.
- ***Consider deviating from the traditional nonprofit model.*** Theaters can establish qualifications for board membership and help vet potential board members to ensure they understand both the artistic and business sides of theater and represent the interests of the community served. Theaters may also explore forming a "low-profit liability company" (or L3C) as a subsidiary to perform activities that do not include live theater.

5. Improve Theater Organizational Culture and Climate

- ***Diversify theater organizations.*** Theaters can broaden the diversity of their staff, audiences, and productions to be more reflective of their communities.
- ***Foster a culture of transparency in the theater organization.*** Open communications regarding theater operations and senior leaders' decision-making can help theaters build trust among their staff and audiences.
- ***Improve workplace conditions.*** Theaters can foster a greater sense of community by eliminating the binary distinction between full-time staff and contract players. Adherence to forty-hour work weeks and five-day work weeks can also provide greater work-life balance for employees.

Purpose of this Literature Scan

The theater industry—which includes both commercial and nonprofit theater companies—is in financial trouble. Even before the COVID-19 shutdown, newspaper articles and reports from industry research groups (e.g., SMU DataArts, CMG, Broadway League) had been warning markets and consumers to expect theaters to close unless dramatic changes were made (Voss et al. 2019). Many theaters continued to operate during the COVID-19 shutdown by taking advantage of federal COVID-19 relief funds and by pivoting quickly to digital formats. As those federal funds have been winding down, the challenges theaters face are growing.

What can theater companies do? For one thing, they can learn from the successes of other theaters that have faced the same challenges. This report summarizes some of the innovative strategies that have helped—or are presumed to help—as reported in the popular press, in academic journal articles, in trade publications, and on blogs posted by theater experts.

This literature scan aimed to address the following questions:

1. What strategies did theaters implement during the pandemic to remain solvent? How were those practices different from those in place before the pandemic?

2. Which strategies are theaters still following to remain profitable?

The questions are addressed in the sections that follow. The first section sets the stage by describing prototypical theater companies—both commercial and nonprofit—and the typical business model that has been followed for decades. It also describes the challenges that theater companies were facing when COVID-19 forced theaters to close in March 2020. The second section describes the health of the theater industry during COVID-19. The third section highlights the strategies that some theater companies have employed, both during and after the pandemic, to keep their doors open and the stage lights on.

Most of the strategies listed in this report are promising, in the sense that there is a sound rationale for believing that the strategies will benefit the theater in some way. However, the evidence supporting the efficacy of any strategy is thin at best. A strategy may be based on nothing more than an expert's opinion. In other cases, a news story that describes a strategy may also include information on changes in the financial position of the theater enacting the strategy. Before committing one's theater company to any particular strategy, theater managers should consider contextual differences that might affect the strategy's impact, such as differences in settings, staff, funding model, or audiences. To the extent possible, names of theaters that are trying a particular strategy are mentioned here so that readers can inquire further with theaters' management about the pros and cons of the proposed strategy (see Text Box 1 for methods used for this literature scan).

Theater Industry Before COVID-19

Between 2002 and 2017, the percentage of Americans who attended live theater events each year decreased only slightly, from 17.1 to 16.5 percent for musical stage plays and from 12.3 to 9.4 percent for nonmusical stage plays (Figure 1; National Endowment for the Arts 2018, 2022a).

However, these slight decreases do not reflect the financial challenges that the theater industry—especially nonprofit theaters—experienced during this time period (Voss et al. 2019).

Text Box 1. Methods Used for This Literature Scan

For this review, we conducted literature searches using the EBSCO academic search premier database and the ProQuest database for U.S. Major Dailies, which includes the *Chicago Tribune*, *Los Angeles Times*, *New York Times*, *Wall Street Journal*, and *Washington Post*. These two database searches were supplemented with a Google search and with some additional literature provided directly to AIR from the National Endowment for the Arts. The search strategy for academic publications limited results to peer-reviewed works published in English between 2021 and 2024, excluding dissertations. Search results from periodicals were limited to blogs, podcasts, websites, magazines, and newspapers in English published after March 1, 2020.

The keyword search terms used for this review included the root words “theater” or “theatre” in combination with the following:

- U.S. performing arts
- Coronavirus, COVID, COVID-19, post-COVID
- Ticket sales
- Audience, audience engagement, audience motivation
- Venue, performing arts venue, performing arts space
- Resilience
- Closure
- Social justice

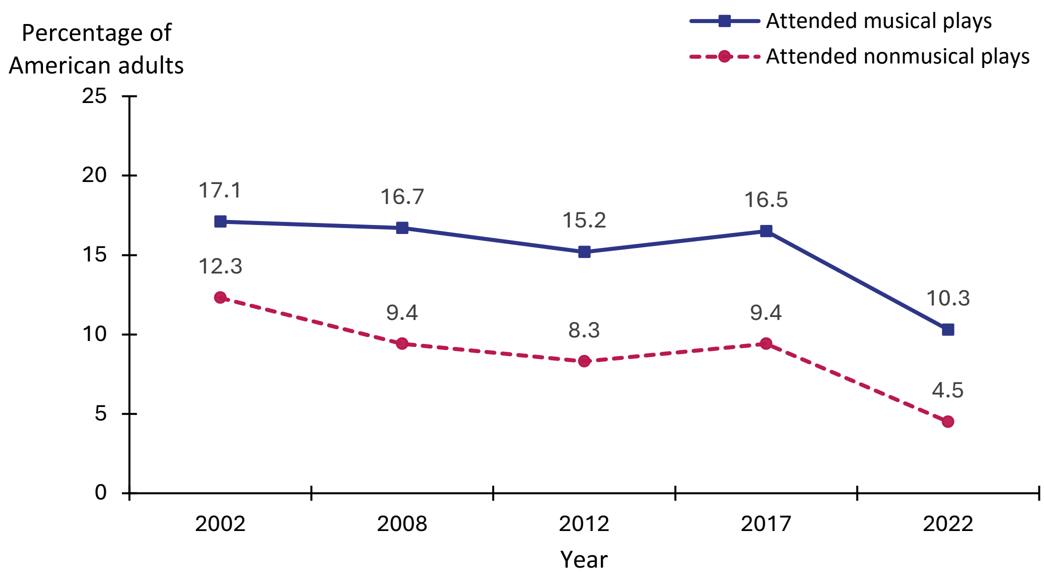
Initial search results yielded more than 500 references, which we sorted by relevance and reviewed. In the case of Google searches, only the first 50 results of each search were reviewed. In some instances, additional sources were gathered from reference lists in the articles, reports, or blog posts identified from the main keyword searches.

While theaters worldwide may be facing similar challenges and the potential to learn from other national contexts, this review focused on sources from the United States to ensure that the strategies reviewed were centered on the conditions specific to this country. However, prominent organizations such as TRG Arts, which collects data on performing arts organizations in the United States and the United Kingdom (U.K.), have reported extensively on the theater industry and as such have included some sources that reflect the U.K.

The relative prosperity of the theater industry is assessed in different ways for different types of theaters (see Text Box 2 for differences between business models for commercial and nonprofit theaters). The financial health of commercial theaters is measured through ticket sales (whether from subscriptions—season tickets—or single ticket sales). The higher the sales, the better the profit for the investors/producers. In 2019, commercial theaters experienced their highest-grossing year, earning $1.8 billion. Attendance that year also hit a record high, exceeding 14.6 million people (Broadway League 2024).

Nonprofit theaters, on the other hand, were in a more precarious position before the pandemic (Voss et al. 2019). The financial health of these theaters is measured by looking at trends among the various funding streams (sales of tickets, earnings from endowments, donations and grants) and expenses (the costs of labor, materials, facility rental) among a set number of theaters. When similar changes in income streams or expenses occur across those theaters, the industry as a whole takes notice.

Figure 1. Percentage of American Adults Who Attended Live Theater, 2002–2022



Source: National Endowment for the Arts 2018, 2022a.

Text Box 2. Theater Business Models

A theater production company's approach to financial challenges is dictated by whether the theater is a for-profit (or commercial) or a nonprofit enterprise. Note that a production company may be separate from the theater venue, in that the physical space where theater is held may be owned and operated by another organization. Theater producers can consist of an individual, a limited partnership, or a corporation, among other configurations, and be incorporated as either for-profit or nonprofit entities (Cherbo 1998). The primary difference between commercial and nonprofit theater business models is the way in which revenue can be used. Nonprofit theaters must put revenue directly back into the organization, whereas commercial theaters may give profits to individuals (Cox 2014).

Commercial theater involves groups of investors that form a corporation or a limited liability corporation for the purpose of producing plays or musicals that make profits for the investors (Spector 2023), with each show becoming its own business venture. Profits are made through ticket sales, sales of merchandise, and possibly advertising within the venue or programs. Production companies rent theater space for each show, and shows will continue to run for as long as ticket sales generate a profit. When shows are no longer profitable, the business is dissolved. Broadway is perhaps the most well-known for-profit theater model, but other Broadway-type productions are found in major metropolitan areas such as Chicago, Los Angeles, and San Francisco. Within the model, producers are responsible for all aspects of development (e.g., securing the rights, hiring the creative team, marketing) and take the financial risk but are rewarded if the show becomes successful (Pereira 2024). Off-Broadway and national touring productions are other common for-profit models.

Nonprofit theaters are typically more mission-driven and community-serving organizations whose main focus is not to maximize profits, but of course they can run commercially successful productions (Cherbo 1998). Nonprofit theaters derive much of their income from subscribers, donations, grants, funding from local and federal governments, ticket sales, merchandising, and advertisements. Nonprofit theaters can also establish a separate commercial subsidiary that generates revenue from renting its space to commercial producers (Cherbo 1998). Regional, children's, and community theaters are commonly known nonprofit models; such theaters are located across the United States, and they range from small local theaters to large multi-million-dollar operations.

The line between commercial and nonprofit productions may, at times, become blurred. For example, commercial producers may underwrite a Broadway tryout production at a nonprofit regional theater, and a nonprofit theater may produce a show that then transfers to a commercial theater, in return for a licensing fee (Cherbo 1998).

Below we explore some additional aspects of the theater industry environment prior to the onset of the COVID-19 pandemic.

Decline in Subscriptions

SMU DataArts performs research on business trends among arts organizations. In one report, researchers described trends in funding and expenses among 75 nonprofit theaters across the United States between 2004 and 2017. The study found that theaters' income from subscriptions was gradually decreasing[1] (by 12 percent) while income from ticket sales for single performances was increasing (by 22 percent). In terms of theatergoers, 28 percent fewer were purchasing subscriptions, and 3 percent more were purchasing single show tickets (Voss et al. 2019).

The replacement of subscription income with single ticket income introduces more risk to theaters. Those with fewer subscriptions have fewer funds to invest in specific productions, and when shows perform poorly, the theater loses money. Theaters with more income from subscriptions have more funds to spread across shows throughout the season, and the theater's overall financial health is less affected by a poorly performing production (Fuchs and Sharrah 2024).

In general, the consumer's freedom to choose which productions to see makes theaters more dependent on ticket sales for individual shows. Accordingly, theaters may be more inclined to produce more popular plays and musicals or less expensive shows and less willing to experiment with new or potentially controversial productions.

Decreased Donations from Individuals, Foundations, and Corporations

For nonprofit theaters, the key metric showing their financial health is called the Change in Unrestricted Net Assets (CUNA). This metric is calculated as the difference between income from all sources (ticket sales, donations, grants, endowments) and expenses, with a positive CUNA value indicating that a theater's revenues exceeded its expenses (and vice versa).

In 2019, the Theatre Communications Group (TCG; a trade organization that tracks the performance of nonprofit theaters in the U.S.) published the results of its annual survey of theaters. It estimated that the average CUNA across nonprofit theaters nationwide was 7.3 percent of their total expenses (Fonner et al. 2019). However, this estimate for all theaters may be biased by just a few theaters that had exceptionally good years. To account for these potential outliers, those who conduct TCG's annual survey track the financial statistics of 84 selected theaters over time (Fonner et al. 2019).

When the trends for these tracked theaters were examined, TCG and its research partner SMU DataArts found that the percentage of theaters with positive CUNAs decreased from 75 percent in 2015 to 48 percent in 2019. The changes did not reflect the incomes that theaters earned from ticket sales, royalties, or concessions—all of which showed positive trends during this period. Rather, the trends showed decreases in the income generated through grants from state governments (-38.2 percent) and donations from foundations (-12.4 percent), trusts

[1] Subscriptions—sometimes called "memberships"—are season tickets. Theaters benefit from strong sales of subscriptions because they provide funds that can be spent throughout the entire season.

(-32.5 percent), and other sources (-14.5 percent). These reductions over time produced anxiety among theater managers regarding the future of their enterprises (Fonner et al. 2019).

Providing Access to Audiences

In the years leading up to the COVID-19 pandemic, many Americans could not access Broadway and touring Broadway shows due to the cost of attendance. Average ticket prices for shows on Broadway increased substantially—from $78 in 2008–09 to $124 in 2018–19 (New York State Department of Labor 2019). Using "dynamic pricing" strategies, also known as "surge pricing" in which pricing fluctuates in real time depending on consumer demand, Broadway producers could drive these costs up to $850 for one ticket, such as in the case of popular productions like the musical *Hamilton*. It is not surprising, then, that the average household income of Broadway theatergoers in 2019 was $261,200 (Broadway League 2020), nearly four times the average household income for New Yorkers that year ($71,855) (Semaga et al. 2020).[2]

For nonprofit theaters, price per ticket varied considerably based on theater size, production, and notoriety of the performers. Some community theaters, for example, have very limited budgets and charge nominal prices for tickets. Larger and regional theaters may put on more elaborate productions and therefore charge more per ticket. In general, recent data suggest that the decline in ticket sales for nonprofit theaters may be due to factors other than ticket prices (JCA Arts Marketing 2023).

Even before the pandemic, theater groups were mindful of the demographics of their audience members. In the 2017–18 season, prior to the pandemic, the average age of theatergoers seeing touring Broadway productions was 53.7 (Broadway League 2018).[3] Broadway engaged younger audiences as reflected in the large number of family-friendly shows such as *The Lion King, Harry Potter and the Cursed Child, Frozen,* and *Aladdin*, all listed within the top ten grossing productions of the 2018–19 season (New York State Department of Labor 2019).

Broadway audiences do not mirror the racial/ethnic composition of the broader public. For example, in 2018–19 only 29 percent of Broadway audiences self-identified as Black, Indigenous, and people of color (BIPOC) compared to 40 percent for the United States and 67 percent for New Yorkers (Associated Press 2021; U.S. Census Bureau 2023). Even though tourists purchase two-thirds of Broadway tickets sold, the New York State Department of Labor (2019) asserts the need for Broadway to attract local audiences, as they are more likely than tourists to see nonmusical plays.

"Cost Disease"

The costs involved in producing plays and musicals also contributed to the percentage of theaters operating with negative CUNAs. Between 2015 and 2019, costs increased for all labor categories

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[2] Findings from a 2024 study make experts question whether high ticket prices represent a real barrier for young people wanting to attend a Broadway show. Among Millennial and Generation Z persons living near New York City (those ages 12–43), the most frequently chosen suggestion for enticing young people to attend Broadway shows is to "lower ticket prices" (chosen by 43 percent of survey respondents). However, the same survey respondents overestimated the cost of a ticket to a Broadway show by 50 percent, and 90 percent of respondents who had attended a show claimed that the experience was worth the cost of a ticket (No Guarantees 2024).

[3] In its 2022–2023 report, the age of the average the Broadway theatergoer dropped to 40.4 years old, which is the youngest in the past twenty seasons (Broadway League 2023). The decrease most likely reflects older Americans' reticence to attend public venues following COVID-19.

by an average of 12.9 percent, after accounting for inflation (Fonner et al. 2019). Other costs went up dramatically as well, including production costs (+24.3 percent), development or fundraising (+11.5 percent), marketing/front-of-house/education (+9.0 percent), and occupancy, rent, building, and equipment maintenance (+18.4 percent). While changes in technology and process efficiencies can help contain costs for some labor categories (e.g., new ticketing and data collection software can free up a ticket seller's time to perform other tasks), other costs go up and cannot be contained using technology or new processes. For example, there are few instances in which technology can help an actor learn their lines. This growing disconnect between ever-rising labor rates and technology's inability to provide counterbalancing cost savings is characterized as "cost disease," a concept characterized in William J. Baumol and William G. Bowen's 1966 seminal work about the economics of the performing arts industry (Baumol and Bowen 1966; Rushton 2017; Tran 2023).

Workforce Challenges

Labor status within the theater varies depending on the type and size of the theater company. Community theaters typically use local volunteers with varying degrees of knowledge and expertise, whereas regional and commercial theaters employ professional actors and crew (Thoman 2024). Many theater organizations classify actors along with other creative staff, technical staff, and other positions such as ushers and attendants, as independent contractors or self-employed workers. Under this distinction, the individual submits an IRS 1099 form and is responsible for paying taxes on any compensation received. They do not receive the same benefits as those in salaried positions (e.g., minimum wage, overtime, workers compensation). The more stable, salaried positions are typically reserved for administrative roles such as the executive director, artistic director, education director, and finance staff among others (Thompson 2015).

While some may idealize the entertainment industry, many creatives in theater face grueling rehearsal schedules, physically and emotionally demanding roles, and low pay (Green 2023). To combat this, over 51,000 theater professionals turn to the Actors' Equity Association ("Equity"), or other labor unions to represent their interests (Actors' Equity Association n.d.a). See Text Box 3 for more information on unions representing live stage performers. These unions negotiate wages and improvements to working conditions and provide benefits, including health and pension plans through national and local contracts spanning both commercial and nonprofit theaters. Not all theater workers choose to join a union despite the potential benefits its membership offers. However, in an industry driven by ticket sales, many workers have relied on unions "to keep them safe and ensure workplace standards that allow them to make a dignified living in America" (Ates 2021). Recent actions taken by Equity and other unions have resulted in higher salaries as well as profit sharing, additional stage management support, and health and pension benefits (Actors' Equity Association 2024). While these changes benefit stage workers, they also put additional financial pressure on theater organizations.

Text Box 3. Unions Representing Live Stage Performers

Actor's Equity Association ("Equity") is one of five labor unions that support actors and theater workers in the United States. The other four unions are the American Guild of Variety Artists (AGVA), SAG-AFTRA (Screen Actors Guild merged with American Federation of Television and Radio Artists), AGMA (American Guild of Musical Artists), and GIAA (Guild of Italian American Actors, formerly Italian Actors Union). They sit under an umbrella union known as the Associated Actors and Artistes of America (Actors' Equity Association n.d.c; American Guild of Variety Artists n.d.; Quinnell 2019).

Though not a comprehensive list, additional unions representing theater and stage workers include Stage Directors and Choreographers Society (SDC), International Alliance of Theatrical Stage Employees (IATSE), and American Federation of Musicians (AFM).

In 2019 (and today in most states), commercial and nonprofit theaters employed two types of workers: (1) contract workers (mostly actors, other artistic staff, and stage managers) and (2) salary- or wage-earning staff who are employed by the theater. Contract workers may dislike the employment arrangement because they receive no benefits (e.g., health insurance) and because they can be fired or laid off without the promise of receiving unemployment compensation. This arrangement can produce a tense work environment between the artistic staff and management, whereby contract staff feel that the long hours of preparation and performance exceed the time specified in their contract (Gelt 2022).

Individuals who work directly for the theater—whether full-time or part-time—have relatively more secure positions. They may receive health insurance through their employer and are entitled to the workplace protections established by their state and union. In times of scarcity, as during the Great Recession of 2007–2009 and during the COVID-19 theater closures, many theater companies scaled back their productions or dissolved altogether, contract workers lost their jobs first, followed by the companies' regular staff (National Endowment for the Arts 2020).

Health of the Theater Industry During COVID-19

On March 8, 2020, New York Governor Andrew Cuomo suspended all Broadway productions and other public gatherings for the indefinite future to contain the spread of COVID-19. Other states soon followed, and by late March most commercial and nonprofit theaters across the country had also closed their doors. In May of that same year, the murder of George Floyd sparked nationwide protests against racial injustice, forcing the entire U.S. theater industry to look introspectively on their own historical practices.

COVID-related closures resulted in a major contraction of the U.S. arts economy. According to data from the Arts and Cultural Production Satellite Account, the arts economy declined between 2019 and 2020 at about twice the rate as the economy as a whole and continued to decline in 2021 as most industries were bouncing back (National Endowment for the Arts, 2022b, 2024). With some exceptions, most theaters were unable to seat audiences for their productions for over a year. The shutdown cut off theaters from their financial lifeline of paying audiences, forcing many theaters to slash their expenses. Theaters laid off thousands of their contract workers and many of their office staff as well (National Endowment for the Arts 2020). Many theaters that were already financially strapped before the pandemic would never recover and moved to downsize their staff or close completely. For example, in July 2023 the Public Theater (New York) laid off 19 percent of its staff, and Steppenwolf Theatre Company (Chicago) followed in August 2023 by laying off 12 percent of its staff (Zara 2024). In March 2023, *American Theatre*—a trade publication produced by TCG—published a list of thirty-five theaters that closed permanently during the pandemic (Pierson et al. 2023). This list is not exhaustive and does not account for all the regional theaters across the United States. that have suspended operations or have shuttered since that list was published.

A series of emergency funding programs passed by the federal government helped to keep many theater companies afloat during the pandemic. Theaters operating as small businesses or nonprofits could receive funds through the Paycheck Protection Program (PPP), which allowed businesses to pay employees for up to eight weeks at their normal rate. Independent contractors also were eligible for the PPP. In the *Budgeting for Uncertainty: Snapshot Survey,* TCG found 62 percent of the ninety-nine theater respondents had received Employee Retention Tax Credit and 24 percent had received a loan from the Economic Injury Disaster Loan Program. Theaters operating in their own venue were able to apply for a Shuttered Venue Operators Grant, which provided up to 45 percent of the venue's gross revenue. Theaters were also eligible to apply for relief funds under the American Rescue Plan (ARP) and the Coronavirus Aid, Relief, and Economic Security (CARES) Act administered by the NEA. The NEA distributed ARP and CARES Act funds to theaters and other arts organizations through state and local arts agencies as well as through direct grants. According to the same 2022 TCG survey, nearly all respondents (97 percent) received some type of federal relief funding during the pandemic, with PPP as the most utilized program (94 percent) (TCG 2022).

By the summer of 2021, vaccine rates increased, and COVID-19 cases decreased, causing local and state governments to relax their COVID-related restrictions and allowing audiences to once again attend theaters and other entertainment venues, albeit with social distancing, mandatory face masks, proof of vaccination requirements, and enhanced cleaning protocols. Broadway theaters ultimately were allowed to resume live performances in September 2021.

The financial recovery of theaters after the pandemic was uneven, with some faring better than others. For example, TCG estimates that between 2018 and 2022 productions and performances at nonprofit theaters decreased by approximately 50 percent, with ticket revenue decreasing by 55 percent during the same period (TCG 2022). A 2023 snapshot survey conducted by TCG found that a majority (55 percent) of the 171 responding theaters expected to operate at a deficit for the 2023–24 season (TCG 2023). The same survey found that 28 percent of theaters reported they were "struggling," and nearly 2 percent were uncertain about whether they would survive the season (TCG 2023). Broadway audiences and tickets sales have yet to recover to pre-pandemic levels. For example, in March 2024 overall Broadway attendance was down 17 percent and box office sales were down 14 percent compared to March 2020 levels (Hernández 2024).

During the pandemic and immediately thereafter, as theaters spent down their ARP funds, theaters had no choice but to get creative about ways to grow audiences and maximize income while minimizing costs. The remainder of this report provides some of the revenue-enhancing and cost-saving strategies that were identified through our literature scan.

Promising Strategies for Theater Success

The strategies listed in this section were either recommended by experts or implemented by theaters during the pandemic to help ensure their continued survival. It is important to note that most of the strategies identified have not been empirically evaluated or tested for efficacy; instead, the strategies are offered as promising practices. In addition, some strategies may be better suited for some theaters over others. In most cases, names of theaters that have implemented the strategies and experts who are recommending the strategies are listed. Theater administrators seeking more information are encouraged to review the sources cited or contact the theaters or experts directly.

1. Leverage Technology

Offer digital performances to broaden the audience base. Theaters that were quick to develop and implement digital options for their productions fared better through the pandemic than theaters that did not (Fuchs and Sharrah 2024; Wallace Foundation 2023). While the primary paradigm of live theater is to perform in front of an audience, survey research conducted in 2022 supports efforts to continue providing digital offerings beyond the pandemic. The study, conducted by Slover Linett Audience Research, showed digital theater attendance 3.2 times higher than in-person for Black individuals and 2.1 times higher for Hispanic/Latinx individuals (Benoit-Bryan et al. 2022). In addition, Americans with disabilities and those with children under 18 also reported favoring online arts and cultural options, suggesting that digital performance may reduce barriers to participation and diversify audiences. While some rural theaters used digital platforms, such as Patreon, as a means of providing content at reasonable costs to audiences, others struggled due to a lack of internet access (Lee 2020). Beyond financial and social challenges, streaming options may also cater to those with “sweatpants syndrome” who prefer to work from home and rarely go to their closest city (Craven 2023; Milligan 2024; Moore 2023).

During the pandemic, theaters in England began offering “back catalogue streaming” to consumers through a pay-per-view streaming service (Langston 2022). U.S.-based theaters, like the American Conservatory Theater, first needed approval from Equity to stream past performances (Lunden 2020).

In one famous example of digital success, the proshot, or professionally filmed live production, of the Broadway production of *Hamilton* was streamed on Disney+ during the pandemic. The success of its streaming appeared to have no negative impact on attendance at its live performances, and in fact increased its demand (Hall 2022).

In another example, the Wilma Theater, a regional nonprofit theater in Philadelphia, provided highly successful digital offerings throughout the pandemic. In 2020, *Heroes of the Fourth Turning* was named as one of the best theater productions of the year by *The Wall Street Journal* and nominated for a Drama League Award, and most notably, the theater won a 2022 Pulitzer

Prize Award in Drama for its 2021 *Fat Ham* digital production. *Fat Ham* would later go on to Broadway and receive five Tony Award nominations, including for Best Play. After the pandemic, the Wilma has continued to offer streaming theater and in 2024 launched its Digital Theater Lab (Wilma Theater n.d.b). Streaming theater tickets are provided via a unique link and are available for one viewing on one device, which can be mirrored or projected onto a larger monitor, such as from phone to TV, using technology such as Chromecast (a Google product), AirPlay (an Apple product) or via HDMI cable for laptop to TV connections. Viewers are allowed to pause and rewind the recording but are limited to watching the production within its four-week streaming run (Wilma Theater n.d.c).

Use online ticket ordering and other systems to make data-driven decisions. Online ticket ordering systems offer theaters not only a way of disbursing tickets, but also an opportunity to gather information to make data-driven decisions about theater operations. Key data collected could include patrons' demographic characteristics, how they learned about the theater, and their show preferences. Theaters may leverage the data collected on their subscribers/season ticket holders and individual donors—and on representatives of foundations and local businesses—to learn to communicate in ways that are meaningful to their constituents (captitles.com n.d.). Theaters vary in the extent to which they have implemented robust data systems (e.g., customer relationship management [CRM] database). CRM databases such as TicketPeak (TicketPeak n.d.) and Tessitura, which was noted as the most used platform by organizations included in the Wallace Foundation's 2023 report on audience-building (Ostrower 2023), can be integral to theaters' marketing campaigns. This technology can support physical mailings and digital communications (e.g., email, social media) to their myriad audiences about upcoming productions, donation gifts, theater news, and special events. For example, Atlanta's True Colors Theatre used heat maps to target direct mail campaigns to theatergoers in specific zip codes (Weinert-Kendt 2023). In another example, the Ballet Austin in Austin, Texas, analyzed data from single ticket sales and discovered that these patrons returned more often than expected. The information was also used to identify marketing strategies and front-of-house experiences that supported their continued return (Wallace Foundation 2023).

By maintaining regular connections with their audiences, theaters may cultivate "friends" who are more likely to renew their subscription/membership, donate, attend more productions, or share their positive theater experience with other prospective ticket buyers.

Go paperless to reduce waste and save on costs. The Kennedy Center in Washington, D.C., offers a digital performance program hub where patrons can view virtual programs for past or future shows, noting that this online format saves 250 tons of paper waste annually (Kennedy Center 2024). For a large organization like the Kennedy Center, this added up to $400,000 annually not including additional costs for printing errors or inserts (Brodeur 2022). In other examples, the Jobsite Theater in Tampa Bay, Florida (Jenkins 2021), and Know Theatre in Cincinnati, Ohio (Know Theatre 2022), post QR codes in their lobby that can be scanned by audience members to access a digital program.

Admittedly, while this strategy may provide operational efficiencies for theaters, some audience members may still want or need a printed option or at least some printed memorabilia such as

Jobsite Theater's printed postcards, which are sent as reminders to season passholders of upcoming shows. Playbill, the industry's main publishing vendor, offers an online tool called PLAYBILLDER to help theaters create online versions of its print programs (Culwell-Block 2024).

2. Provide Alternative and Tailored Ticket Models

Explore flexible subscription models. With 53 percent of Americans wanting more affordable ticket prices, some theaters have moved away from offering only two ticketing options—subscriber tickets and single show tickets—and have adopted a multi-tier structure to allow for more options (Benoit-Bryan et al. 2022). For example, the Majestic and Empire Theaters in San Antonio offer Starlight Suite Memberships, which is their full subscriber option; the Starlight Suite Flex Package, which enables theatergoers to purchase tickets for the same suite for multiple shows; and the opportunity to just buy tickets for individual shows. Both Starlight packages include amenities such as valet parking and seat-side service (ATG Entertainment Holdings 2024).

Offer ticket discounts for youth and young adults. The future of live theater depends on cultivating younger audiences who will presumably become theatergoers in adulthood; however, many young adults consider themselves as priced out of live theater. Well before the pandemic, theaters worked to cultivate younger audiences by providing them with discounted tickets. Theaters developed creative variations of this practice during their 2021 reopening. For example, Arena Stage in Washington, D.C., offers the "Pay Your Age" program, in which patrons aged 30 and under pay a discounted, prorated ticket price based on their age. The New York City Center (another performing arts venue) sets the age limit even higher, with discounted tickets available through their Access Club to anyone 35 and under (New York City Center, n.d.). In addition, knowing that people prefer attending novel events with a friend, theaters could build up the future generation of theatergoers by offering two-for-one ticket deals at discounted prices. Currently, the Broadway League sponsors the Broadway Bridges initiative which provides $10 tickets to tenth grade students in New York City public schools.[4]

Create digital lotteries for tickets. Theaters can engage new audiences through digital lotteries in which they enter to win substantially discounted tickets. The concept of digital lotteries for theater tickets is not new, dating back to the late 1990s when the musical *Rent* transitioned from offering a rush line, or discounted tickets on a first-come, first-served basis, to a digital lottery system. This transition was made to prevent potential audience members from waiting overnight on the street (Culwell-Block 2015) and would eventually catch on with other Broadway shows. For example, the original Broadway and subsequent touring productions of *Hamilton* are well known for their lottery system, in which a limited number of tickets are made available for only $10 (Feldman 2024).

Consider all-access memberships. All-access memberships allow audiences a streamlined way to attend unlimited theater performances for a flat fee, which provides cost savings to the customer compared to a per-ticket price model. The Woolly Mammoth Theatre Company in

[4] See www.broadwaybridges.org.

Washington, D.C., has created an all-access ticket to every show it produces, called "The Golden Ticket" (Wallace Foundation, 2023). Similarly, the Olney Theatre Center in Maryland offers an all-access membership each quarter in which members can attend all performances during the three-month period (Olney Theater Center n.d.).

3. Curate Programming and Provide Experiences to Connect with Existing and New Audiences

Get to know your audience through data collection. Knowing one's audience involves more than maintaining a list of subscribers, donors, and funders (Mannino 2023). For example, theaters can engage in data collection activities including focus groups and surveys that inquire about which types of productions audiences are most interested in and what barriers prevent them from attending theater events (Granneman 2022). When theaters are considering a number of productions for the following season, they can survey their audience to determine which potential shows are the most popular and generate the most interest (Nemeth 2023).

Adopt a proactive marketing strategy that harnesses the power of social media. Social media can be a powerful, cost-effective tool for theaters to use to connect with their community and as part of their marketing strategy. Dave Wakeman, a consultant and former theater administrator, suggests that all too often theater companies take a reactive approach to marketing by expending few resources on promoting a show until it is reviewed by theater critics. Key phrases from the reviews are then used in promotional materials and messages (e.g., "*The New York Times* has called *Drunken Shakespeare* 'Zany, Rowdy, and Debaucherous'!"). Wakeman suggests that instead, marketers should promote the productions early and often—before the production is released—using emotion-laden scenes and descriptions in social media. Wakeman also believes that instead of retreating from or outsourcing sales and marketing efforts, arts organizations should double down on strategic marketing to appeal to the "emotional core" of their audiences, particularly by better communicating the value they provide (Wakeman 2017).

Social media platforms like TikTok and Instagram can help theaters stay directly connected to their audiences while building brand awareness (Forrey 2021). Theaters can post content and respond to comments in ways that capture the emotional tone of each production (e.g., more serious for dramatic plays or whimsical for a youthful musical). Asking questions and directly responding in the comments section is another way to gather information about audience preferences. Another social media strategy is to post content that is not specifically about the production itself but builds another point of connectivity through behind-the-scenes posts and introductions to cast and crew members.

Theaters can also seek to build connections with social media influencers. Influencers bring a seemingly independent perspective on productions and can connect with a much broader audience than can theaters' marketing efforts alone (Bahr 2024).

Show value by offering an experience audiences can't get at home or other public places. The theater industry is not just competing against streaming services and the comforts of home, they are also competing against other places and activities where people feel a sense of community, such as coffee houses, bars, parks, and sporting events (Smith, 2024). Theaters must show potential audiences that their product brings as much value—or more—than that experienced in other settings. AKA, an international advertising and marketing firm that specializes in arts and entertainment, has developed an expected value framework (referred to as a "Worth it Index") that models the factors individuals weigh when deciding whether to attend live events and attractions. At the heart of the model is a cost-benefit assessment. If the perceived value of a performance outweighs the perceived costs, then an individual is more likely to attend a performance. Costs can be numerous, including the monetary cost of tickets, childcare, parking, and dinner; the perceived risks associated with the event such as safety; the potential emotional risk of feeling unwelcomed; and the effort associated with attending the event, such as traffic, finding a parking spot, and ease of buying tickets. Value can be demonstrated by convincing potential attendees that the event will be engaging and entertaining (experience), the experience can be had only through live attendance (exclusivity), and they will want to share the experience with others (shareability). Under this framework, a theater's marketing staff should downplay the costs associated with attending the event and instead produce marketing materials that emphasize perceived benefits such as enjoyment of the event, the rarity of the event, and the likelihood of wanting to share the experience with friends (Jablonski 2024).

To make the show more memorable, theaters and production companies need to heighten the experience that audiences feel when they attend a show. Creating an enhanced front-of-house experience was underscored by many theaters (Wallace Foundation 2023). This can go beyond the design of the physical space (Long 2017) and move more into the interpersonal such as the strategy implemented by Portland Center Stage since 2016. The Portland Center Stage matches season ticket holders with a "personal concierge" who can answer their questions and shares information about events and other benefits (Portland Center Stage, n.d.). Theaters can also consider performing the show in a nontraditional venue. For example, the Goodman Theater in Chicago performed a play in Abbott Park on Chicago's south side using a truck bed as a stage (Jones 2020). In another deviation from the ordinary, Control Group Productions in Denver performs immersive theater using a 2006 school bus (Veltman 2023). During the COVID-19 pandemic, many theaters deviated from the normal "script" by moving their productions to outdoor venues that better allowed for social distancing.

Host engagement activities. Engagement activities separate from theater performances can be used by theaters to connect with audiences in a less formal setting. For example, the Geva Theater in Rochester, New York, offers several unique engagement opportunities: "Geva Insights," a post-performance discussion with leaders, experts, and community members about the themes presented in the performance; "Mondays at Geva," an opportunity for community members to interact with artists, performers, and speakers in the café and lobby during the theater's off-night; and symposia on special topics (Geva Theater 2024). The MCC Theater in New York City also offers special engagement events. It hosts forums and community events in which experts, community leaders, and others can discuss the issues underlying the plays. The theater facilitates post-performance discussions among audience members regarding the performances (MCC Theatre 2024).

Find the right balance between productions that are familiar and novel. Large, well-known plays and musicals tend to draw larger audiences, which can then foster return visitors. Broadway theaters employed this strategy effectively immediately after COVID-19 restrictions were lifted. Among the shows that opened in September 2021 were *Mr. Saturday Night* (staring Billy Crystal), *MJ* (a musical about Michael Jackson), and *Six* (an international hit about six of Henry VIII's eight wives). Other theaters that opened with new ventures saw fewer profits (Seymour 2022). Another example of a theater that did particularly well in 2022 was the Candlelight Theater in Johnstown, Colorado, which showed a series of popular, family-friendly productions like *The Sound of Music*, *Singin' in the Rain*, and *Cinderella* (Moore 2023). In addition to offering well-known favorites that can bring in new audiences, theaters can also weave in a few new productions that speak to the theater's mission and audience preferences (Seymour 2022).

Provide a welcoming environment to all. In a 2022 survey, 58 percent of Americans said that arts and culture organizations should be welcoming to all people (Benoit-Bryan et al. 2022). Theater audiences typically do not reflect the demographics of the general public, skewing toward individuals who are older, White, college educated, and have relatively higher incomes (National Arts Statistics and Evidence-based Reporting Center 2024; Stith et al. 2021). The theater industry had been looking at ways to connect with more diverse and younger audiences even prior to the pandemic and the racial justice movement sparked in 2020. Many theaters are adopting playwright Dominique Morisseau's "Rules of Engagement" that help theatergoers from diverse backgrounds feel more comfortable to react emotionally during performances while not distracting the actors (Morisseau, 2015; Playmakers Repertory Company, n.d.; Scott, 2021).

As live theater resumed, venues implemented protocols to create spaces that would allow all audiences, including those who were most at risk for COVID-19, to enjoy shows. Strategies such as shorter shows, more shows at lower capacities, and reduced concessions, in addition to the mask mandates, helped theatergoers feel safer in large crowds (Jones 2021). With the threat of COVID-19 waning in the minds of many, mask mandates for audiences and artists have disappeared from most theater productions (Levitt and Zamansky 2023). This shift back to previous ways of operating can alienate at-risk theatergoers and theatermakers (Tozian 2024). Although not mandated, many theaters still encourage mask usage, and most offer other accommodations. For example, Wilma Theater offers assistive listening devices; captions and audio descriptions for digital and select live performances; relaxed performances for individuals with autism, ADD, ADHD, dementia, and sensory sensitivities; and warning notices about fog/haze, flashing lights, gun shots, and other loud noises (Wilma Theater n.d.c).

4. Consider Alternative Administrative Practices

Nonprofit theaters can measure success by using mission-aligned metrics. While commercial theaters measure success based solely on profit, nonprofit theaters face a more complex issue of articulating success that may have little to do with income and expenses and everything to do with their connection to the community. This requires that their vision and mission are aligned with other management practices (Gruhin 2020; Voss and Voss 2020) such as offering educational and community-based programming or business training (Pierson et al. 2023). As one theater administrator suggested, theaters could reimagine their value beyond the artistic, similar to how libraries have done more than provide books—thus becoming more integrated and rooted in their communities (Walsh 2022). For example, two theaters in Atlanta, Georgia, Out of Hand and True Colors, have used their missions to guide business decisions and shed light on underserved communities (Harrison 2024; Weinert-Kendt 2023). In its mission statement, Out of Hand affirms its work "at the intersection of art, social justice, and civic engagement. We help create a more just world" (Harrison 2024). Metrics may point to statistics related to improved education from its Creative Kids program or participation in other social justice efforts such as Equitable Dinners and Shows in Homes. For Chicago Children's Theatre, a mission that "engages and inspires the child in all of us" meant creating inclusive offerings such as the Red Kite Project, which provides programming and learning opportunities for children with accessibility needs such as autism and other developmental disabilities (Chicago Children's Theatre 2024). In these examples, financial success was a byproduct of staying focused on mission, but not the primary goal (Weinert-Kendt 2023).

Try distributed leadership models. Americans tend to approach work hierarchically, with one person (or a board) providing vision, a select few breaking down the vision into tasks and processes, others directing the work, and yet others doing the work. Most theaters are organized this way as well, with theater management led by two directors: the artistic director who oversees the productions and a managing or executive director who oversees operations and business aspects of the theater company. These two directors are accountable to a board of directors that provides overall vision to the theater's work. However, having a single artistic director restricts the opportunities for advancement, higher compensation, and broader artistic expression among directors, playwrights, actors, and others. Some theaters have been exploring distributed leadership models where management is shared among a larger group. For example, Avant Bard Theatre in Arlington, Virginia, adopted a five-person leadership structure (producing partners); these partners divide up artistic direction responsibilities and other management responsibilities between them (Avant Bard 2021). The Wilma Theater in Philadelphia also adopted a distributed leadership model by appointing three co-artistic directors. This management structure involves an annual rotation of one co-artistic director to the lead artistic director role and supportive artistic director roles for the other two. The three co-artistic directors work alongside the theater's managing director (Crimmins 2021).[5]

Consider deviating from the traditional nonprofit model. According to the Theatre Communications Group's *Theatre Facts 2022* report, there are roughly 2,006 nonprofit regional theaters across the United States (Roscoe et al. 2022). To retain their tax-exempt status, these theaters need to maintain a governance structure that may impede their ability to serve the local community and increase income. Specifically, theaters' governing boards can be composed of individuals who lack understanding of both the artistic and business sides of theater and individuals who do not represent the community served by the theater (Mondello 2022). To remedy the ills brought about by out-of-touch boards, Michael Bobbitt, the executive director

[5] The Playwrights Realm hosted an online forum involving representatives of Avant Bard, the Wilma Theater, and two other theater companies that recently adopted distributed leadership models. The recording of the forum discussion can be found at https://howlround.com/happenings/different-leadership-models.

for the Mass Cultural Council (and former artistic director for the New Repertory Theater in Watertown, Massachusetts) has suggested that theater companies adjust the relationship between boards and theater artistic and business staff so that staff develop qualifications for board membership and help to vet potential board members. He also recommends that artists and community members serve on theater boards and that board members serve as "ambassadors" for the theater rather than "overlords" (Bobbitt 2021).

Another issue inherent in the nonprofit theater model is that its intended purpose—to give theaters an opportunity to experiment—cannot be fulfilled when corporate, foundation, and grant funding declines. Rather than taking risks with new and potentially controversial plays, nonprofit theaters are more likely to produce established plays with solid histories of strong ticket sales. Jeff Leitner is an organizational consultant who helps leadership teams produce innovative and transformative solutions to challenges. He recently identified this issue and proposed an innovative dual-organizational structure that may help to address it (Leitner 2024). He recommends that the nonprofit theater create another business entity, formed as a "low-profit liability company" (or L3C).[6] All activities presently performed by the nonprofit theater that do not involve live theater can be shifted to the L3C, which is made a subsidiary to the nonprofit. The nonprofit remains the majority shareholder of the L3C, but the L3C can take on additional institutional and individual investors. Leitner states that the theater-linked L3C is a more attractive grantee for foundations since they expect their investments to serve as seed money or "catalytic capital" that generates additional revenue.

Consider advantages to owning, leasing, and renting out performance space. In New York, a Broadway theater space is classified as consisting of 500 or more seats, an off-Broadway space has a capacity of 100–499 seats, and an off-off-Broadway space has a maximum capacity of up to 99 seats (Mink 2022). There are currently 41 Broadway theaters or "houses" operated and owned by "landlords," and the Shubert Organization currently owns the most Broadway houses (seventeen theaters). In 2023, two other Broadway landlords (Jujamcyn Theaters and Ambassador Theatre Group) were merged under Ambassador Theatre Group's parent company, International Entertainment Holdings Limited, to increase their combined footprint to seven Broadway houses (Huston 2023). The Nederlander Organization is the other major Broadway landlord.

In major U.S. cities, many non-profit theaters are unable to pay the steep prices to buy or enter a long-term lease with performance venues. Accordingly, some non-profit theaters have opted to share performance spaces with other groups. For example, New York's Second Stage Theater and Soho Rep, both distinguished nonprofits that owned and leased long-term spaces, now share space with other theaters. Second Stage shares space with Signature Theater, and Soho Rep shares space with Playwrights Horizons (Paulson 2024).

Other theaters have chosen to completely forfeit their space altogether. In April 2024, the Long Wharf Theatre in New Haven, Connecticut, announced its sixtieth anniversary season and its second using an itinerant model that takes productions to venues across the community (Long

[6] Leitner states that only Illinois and eight other states have laws allowing for L3Cs, but similar types of business entities can be formed in the other 41 states as well.

Wharf Theatre 2024). For its 2023–24 season, productions took place in spaces such as libraries, resident homes, and community centers, fostering connection within the local community while also alleviating some of the theater's financial burden in maintaining its own venue (Tran 2023). In another example, Dell'Arte International, a nonprofit theater training, research, and performance organization located in Blue Lake, California, sought to sell off revenue-generating property to get an infusion of money and maintain its nonprofit status (American Theatre 2024; Vanderheiden 2024). For Dell'Arte International, the balance between mission-driven revenue and unrelated business income from the 1.33-acre property that houses the Mad River Brewery and Tap Room was putting the organization's nonprofit status at risk. Many regional theaters choose to hold on to owned venues and rent the space to other organizations as a means to generate revenue.

Right-size the scale and number of productions and ancillary services. To survive COVID-19 and remain financially solvent, many theaters scaled back productions. Building back capacity may take time as audiences re-establish the habit of leaving their homes to consume entertainment and as theaters balance the number of productions and performances offered to be commensurate with audience demand (Pierson et al. 2023). In planning for a season, theaters could curate productions likely to resonate with their audiences. In extreme situations, some theaters may choose to cut the number of productions offered during their current season (Pierson et al. 2023). By cutting productions from their season, some theaters are able to save the costs involved in casting and rehearsing a show and designing and constructing sets.

For example, in 2022–23, Connecticut's Downtown Cabaret and Westport County Playhouse decided to cut shows from their schedules as a cost-saving strategy (Craven 2023). However, the decision to cut productions during a season should be a last option. Cutting productions in development may create ill will among the production staff, it may disappoint the theater's loyal subscribers, and it may signal to institutional funders that the theater no longer holds a stable financial position.

For some, the size of the venue can play a part in determining the number of shows offered. For example, the University of California, Los Angeles (UCLA) Nimoy Theater, previously called the Crest Theater, in Westwood, California, was able to retain its traditional fifty-show schedule due to its move from an 1,800-seat venue on the UCLA campus to the more "intimate" 300-seat location (Gelt 2023).

Other theaters reduced expenses for labor and materials by offering hit productions with relatively smaller casts and streamlined sets (Lee 2024). For example, in its first production after the COVID-19 lockdown, the Laurel Mill Playhouse in Laurel, Maryland put on a short seventy-minute show fashioned like a 1940s live radio show (Jones 2022).

While many theaters turn to concessions such as the sale of alcohol to bring in revenue, one theater implemented an outside-the-box cost-savings solution of cutting concessions from its budget completely while still offering the opportunity for audience members to enjoy refreshments. The Downtown Cabaret in Bridgeport, Connecticut, does not offer concessions but instead allows audiences to bring their own food and beverages. The theater also asks the audience to take their own trash and dispose of it elsewhere. This "take out your trash" request helps the theater reduce its $15,000-per-year waste removal costs (Craven 2023).

Forge partnerships and alliances to create a stronger theater community. The COVID-19 lockdown was an isolating time for many. But for some in the theater world, it created new and stronger partnerships that helped to ensure their collective survival, such as more collaboration between commercial and nonprofit theaters (Crown 2023). Collaborations between commercial and nonprofit theaters is not new. For example, some Broadway producers pilot new shows in nonprofit theaters where experimentation is standard fare. Similarly, productions first offered in nonprofit theaters can get picked up by a Broadway producer, as in the case of the Pulitzer Prize–winning *Fat Ham*. Theater leaders, such as executive director and CEO of Chicago's Goodman Theatre Roche Edward Schulfer, echo the importance of these connections, stating "It is essential that not-for-profit and commercial theater producers begin to work together and collaborate with artists to advocate for the theater industry" (Schulfer 2023).

Within nonprofit theater groups, some banded together to reuse and share sets or sell sets that are no longer needed to theaters planning to produce the same show (Mangi 2022). Theaters can also share administrative staff and functions, such as IT, development/fund-raising, and certain human resource functions (Pierson et al. 2023). Roundabout Theater Company and New York Theatre Workshop, two powerhouses in nonprofit theater, teamed up for their co-production of *The Refuge Plays*, in which they were able to share both artistic vision, financial resources, and audiences (Tran 2023). For example, the Roundabout Theater Company and New York Theatre Workshop share staff that serve similar functions (Tran 2023). Partnerships can also coalesce around shared rehearsal space. For example, IndieSpace, a nonprofit that supports New York City's indie theaters, has partnered with other New York theater companies (Rattlestick Theater and the New Ohio Theater) to create the West Village Rehearsal Co-op. The partnership was able to negotiate a ninety-nine-year lease for the basement of a building in New York's Meatpacking District. The co-op operates the space and charges just $10 an hour to use the space (Veltman 2023).

5. Improve Theater Organizational Culture and Climate

Diversify theater organizations. Many of the articles, studies, white papers, and blog posts reviewed for this report indicate a need to diversify both theater audiences and the theater workforce. In 2022, 56 percent of Americans surveyed wanted arts and culture organizations to embrace equity and inclusion—more diverse staff, more diverse audiences, more diverse plays, offerings that focus on societal issues, fair and equitable treatment of employees (Benoit-Bryan et al. 2022). Members of the theater community themselves have called for greater diversity and representation among the industry's workforce. For example, in summer 2020 a group of more than 300 BIPOC theatermakers formed a collective known as We See You, White American Theater, and published a testimonial letter that called for the following:

> As a global majority, we demand a bare minimum of 50% BIPOC representation in programming and personnel, both on and off stage. This applies universally to all hiring tiers of Broadway, Off Broadway, regional theaters, funding recipients, artistic commissions, production departments, front of house staff, offices, professional training

> centers, unions, agencies, casting companies, critics, and the media establishment. (We See You W.A.T. n.d.)

The Actor's Equity Association was already heeding the call. Prior to the pandemic, theater workers seeking to join the union had to earn twenty-five creditable weeks of employment on an Equity-contracted production before being eligible for membership under its Equity Membership Candidate Program (Actors' Equity Association n.d.d) or be offered an Equity contract by a professional producer under a related union such as SAG-AFTRA. In 2021, Equity implemented a new policy called Open Access to remove barriers to the union and increase diversity in its membership, citing only 26 percent of its members identified as BIPOC (Culwell-Block 2023). With the new Open Access policy, anyone that can prove that they have experience working within Equity's geographical jurisdiction can join, replacing the previous credit requirements.

Foster a culture of transparency in the theater organization. A theater organization's culture can help advance (or hinder) meeting its intended goals and ensuring strong financial stability (Voss and Voss 2020). Open transparency and communication regarding theater operations and senior leaders' decision-making can help build trust among its staff and audiences. Theater experts are calling for greater transparency regarding the selection of boards of directors and board operations (Bobbitt 2021), casting choices (Peterson 2017), donors/investors (Sapi 2021; We See You W.A.T. n.d.), employee compensation (American Theater, 2022), and financial decisions (Boroff 2024).

Improve workplace conditions. In 2020, the nonprofit theater industry's main trade publication, *American Theatre,* published a three-part series of guest columns in which arts managers shared their vision for the theater industry after the COVID-19 pandemic. Jim Warren, the founding artistic director at the American Shakespeare Center, authored Part 2 of the series, in which he described many of the ills that were plaguing the theater workplace (Warren 2020). The recommendations provided, which he implemented in his work settings, include the following:

1. Establish a one-company model, instead of a bifurcated "staff" versus "artistic contract players" mentality.
2. Commit to a forty-hour work week, five-day work weeks, paid vacation, and holidays or holiday equivalents for all.
3. Return to true rotating repertory (that is, presenting different shows daily or two shows on the same day).

Conclusion

The U.S. theater industry has long faced substantial challenges, which were made even more pronounced by the COVID-19 pandemic. Dwindling audience attendance and ticket sales have forced theaters to make tough decisions to remain financially solvent. However, opportunities exist for theaters to remain dynamic organizations that meet these challenges by adapting to the current landscape and growing future audiences.

This review of the recent literature suggests key strategies that may prove beneficial in supporting theaters' survival in the post-COVID era. One promising strategy is to leverage technology in the delivery of theater experiences (e.g., streaming) as well as in strategic marketing (e.g., database mining) and cost-saving practices (e.g., digital programs). Exploring various ticket models (e.g., flexible subscription, all-access) and even ticket discounting (e.g., lottery, age-based pricing) can help meet audiences' changing preferences for less rigid subscriptions and address their affordability concerns while attracting new theatergoers.

Theaters can also adjust their programming (e.g., classic vs. new productions, community engagement activates) to meet audience demand as well as to allow room to grow the number and diversity of new audience members. In addition, theater organizations may alter their own business models (e.g., collaborative leadership, cost-saving partnerships) and organizational cultures (e.g., inclusiveness, transparency) to help achieve and sustain financial solvency through business efficiencies and broad-based engagement and community support. The strategies summarized in this report have not been empirically tested to understand their impacts on key outcomes such as increased audience attendance; instead, they reflect promising practices that theaters have implemented since the pandemic.

Future research on this topic could include an implementation study to better understand how theaters have implemented selected strategies and more evaluative research to understand potential impacts of the specific strategies adopted. For example, a study could be designed in which some theaters pilot a strategy while others do not, and then their finances could be compared to highlight relationships between the practices implemented and measurable outcomes that are meaningful markers of financial health.

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