



International Survey On The Impacts of COVID-19 On Performing Arts International Mobility

Report and analysis of the results of the survey

CYNARS



Now that we are all under the yoke of COVID-19, compelling us to reconsider how we approach presenting shows in the performing arts, CINARS took the initiative of launching an extensive worldwide study, using its contact network estimated at more than 30,000 professionals.

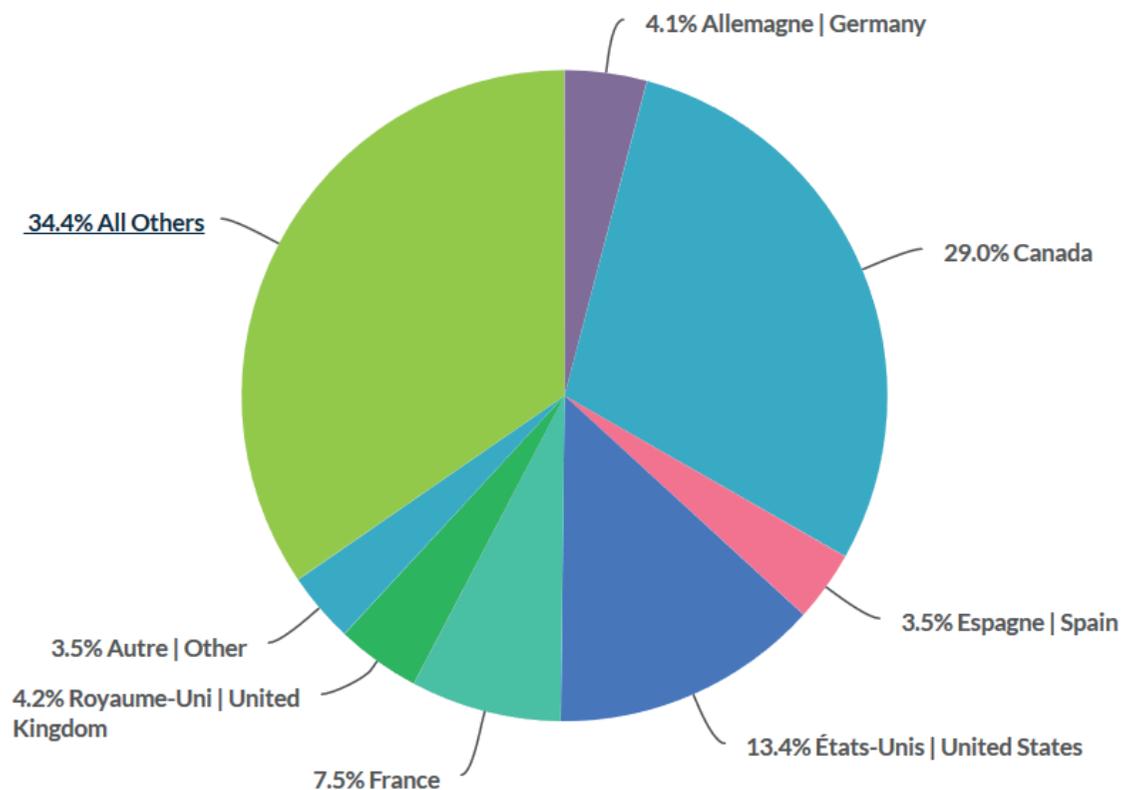
The survey was conducted in **April of 2020**. The following is a picture of the **professionals' impressions and expectations** as experienced in the month of April. All were in agreement that conditions change rapidly everywhere on the planet. Indeed, some countries have implemented various strategies of de-confinement, which are still at the trial stage.

Naturally, given that this survey started in Canada, close to 30% of the respondents are Canadian.

844 professionals took part in our survey. We concentrated our analysis on the **737** respondents that completed the survey in its entirety. They hailed from **45** countries, located on five continents.

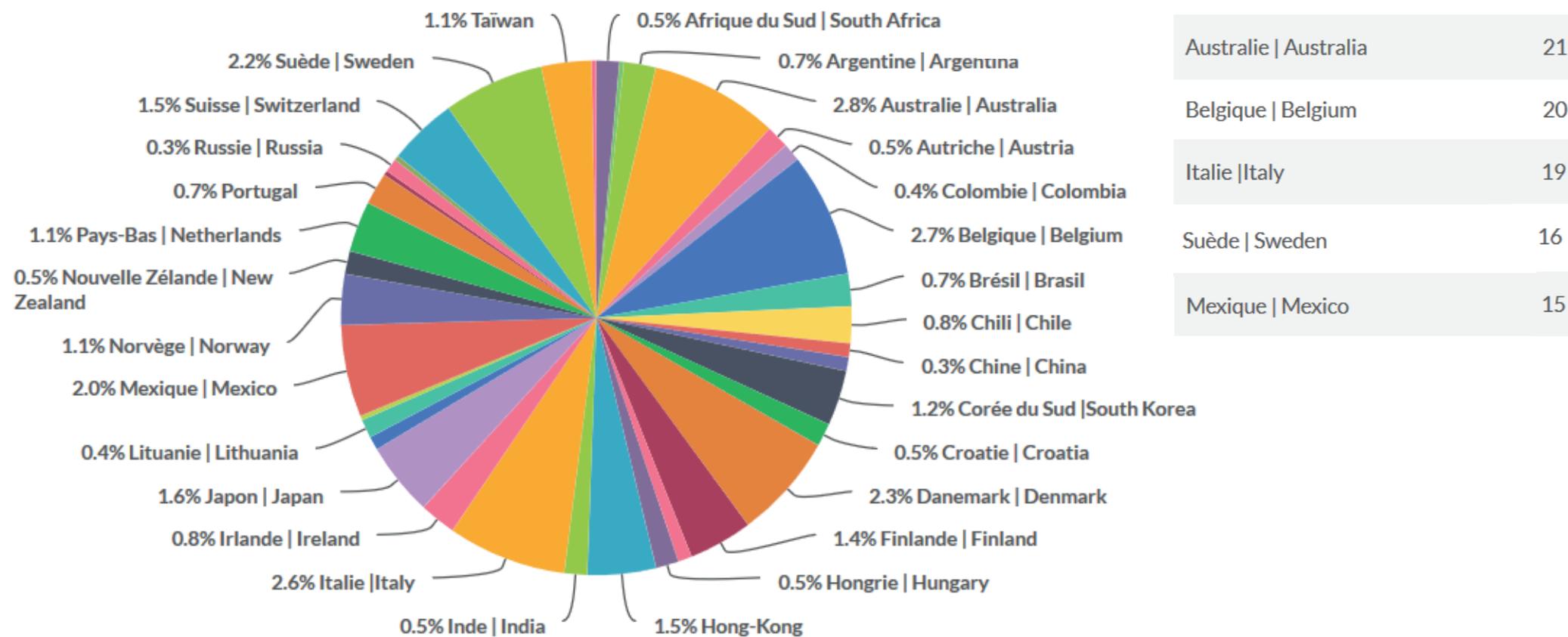
QUESTION 1 : COUNTRY

The tree graph of the two diagrams (pages 3 and 4) illustrates the extent and the origin of the respondents who feel strongly about maintaining international show presentation for the performing arts. Naturally, the respondents are those whom have been at the centre of our business relationships, established over the years, building bridges between Canada and the worldwide contemporary performing arts community.



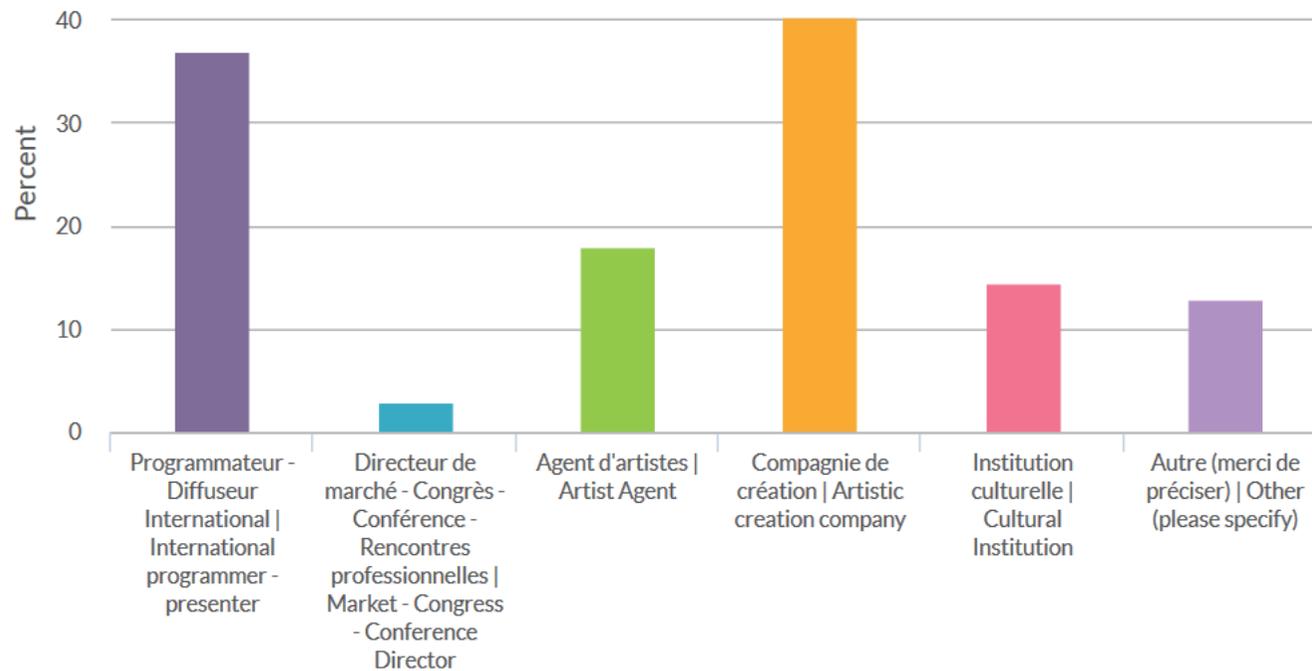
Allemagne Germany	30
Canada	214
Espagne Spain	27
États-Unis United States	99
France	55
Royaume-Uni United Kingdom	31

QUESTION 1 : COUNTRY



QUESTION 2 : OCCUPATION

Our concern was to get a reading of the different types of professionals active in the economy of international show presentation. We sent the survey to creation companies that toured internationally, to the programmers who present foreign works, as well as to cultural institutions and conferences/markets. The category “other” was comprised mainly of artists and organisers of festivals.



Programmeur - Diffuseur International International programmer - presenter	273
Directeur de marché - Congrès - Conférence - Rencontres professionnelles Market - Congress - Conference Director	22
Agent d'artistes Artist Agent	134
Compagnie de création Artistic creation company	298
Institution culturelle Cultural Institution	108

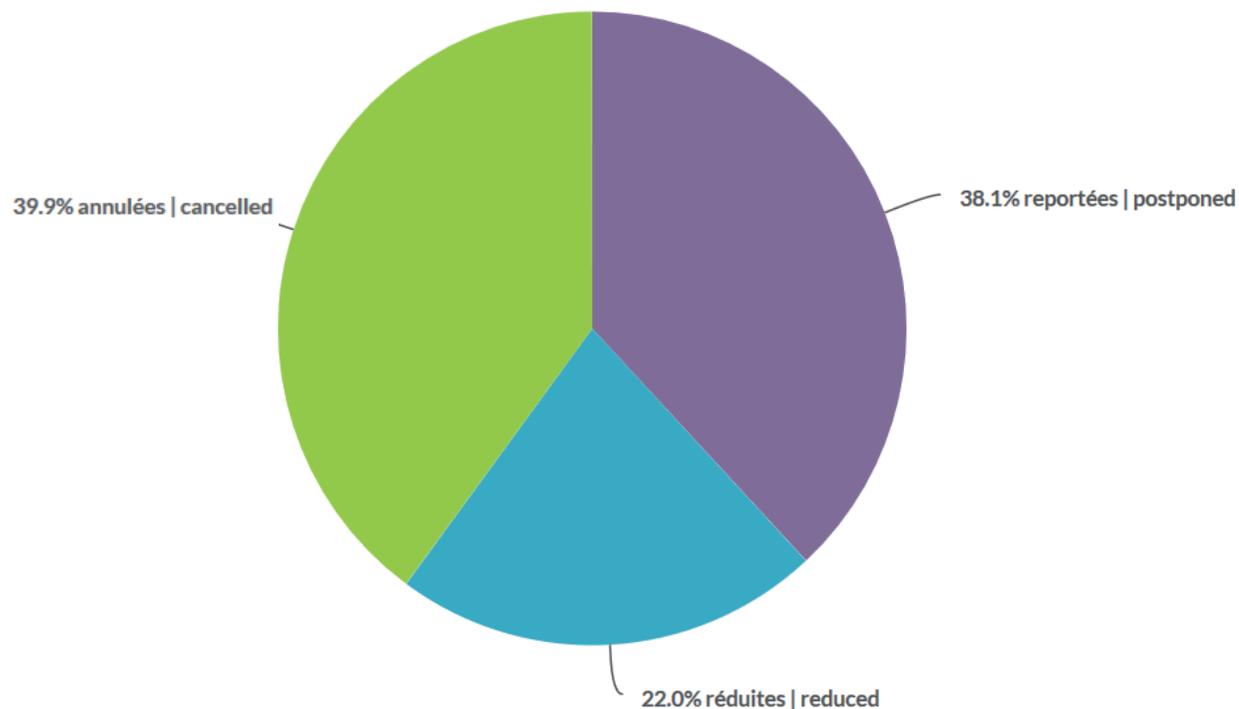


QUESTION 3 : ACCORDING TO YOU, THE MAJORITY OF YOUR INTERNATIONAL PROGRAMMING ACTIVITIES IN 2020 WILL BE POSTONED, CANCELLED OR REDUCED ?

The COVID-19 crisis brought the touring activities of the performing arts to an immediate halt in March of 2020. Therefore, our survey conducted in April of 2020, sought to obtain a snapshot of the real repercussions involved. We know that negotiations were taking place in order to avoid any damages for the programmers, as well as for the companies and agents.

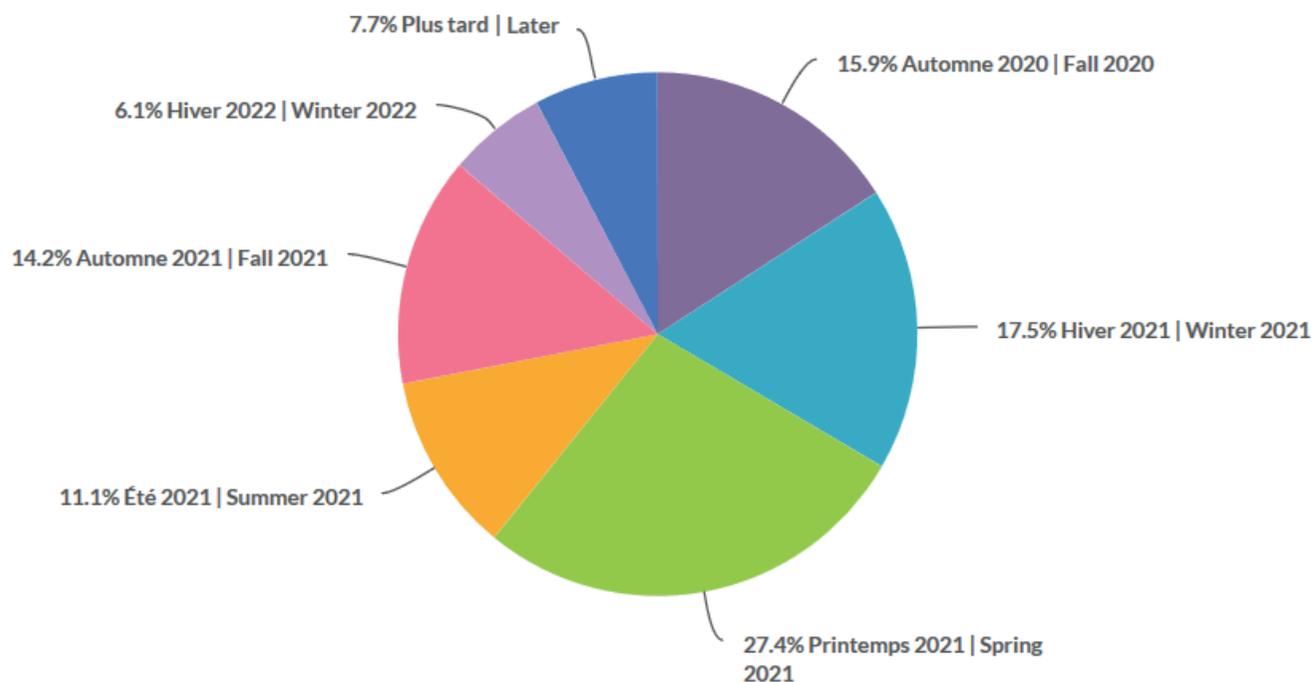
It is important for us to understand the estimated impact of the shows that were postponed, cancelled, as well as the reduction of activities in the months to come. It is important to stress that, as of mid-April, the proportion of shows that were **postponed (38.1%)** and **cancelled (39,9%)**, were more or less equal.

Indeed, since then, the confinement of the general population has slowed the recovery. We fear that there will be an increase in cancellations and therefore, a lost of audiences of shows postponed. In order to maintain touring projects currently in negotiation, we must establish flexible means of financial support for travel expenses. This way, we will be able to see a quickest possible recovery in performing arts international touring, rising above the ashes of confinement and closed borders.



QUESTION 4 : WHEN DO YOU ESTIMATE THE «NORMAL» RESUMPTION OF YOUR INTERNATIONAL ACTIVITIES ?

The world grinded to a halt in March of 2020, a standstill that will most likely last until the end of the summer. **60.8 % of the respondents expect a recovery in the next 12 months.** 27.4 % of the respondents expect a recovery of programming activities by the spring of 2021. 33.4 % expect it will recover by the fall of 2020 / winter of 2021.



Automne 2020 Fall 2020	118
Hiver 2021 Winter 2021	129
Printemps 2021 Spring 2021	202
Été 2021 Summer 2021	82
Automne 2021 Fall 2021	106
Hiver 2022 Winter 2022	45

QUESTION 5 : DO YOU ANTICIPATE A SIGNIFICANT DECREASE IN YOUR INTERNATIONAL PROSPECTING TRIPS ?

Indeed, the confinement imposed last March left an impression on people. 9 % expect to maintain their international prospection travel plans in 2020. Circumstances are changing rapidly and several countries are already considering strategies of gradual de-confinement. It is important for the sake of the 2020-2021 season, to consolidate and secure business relationships by energizing business prospecting and programming activities, so as to keep the networks active during this crisis.

In 2021 (also confirmed in diagram 4), 53.7% expect a recovery of their international travel activities.

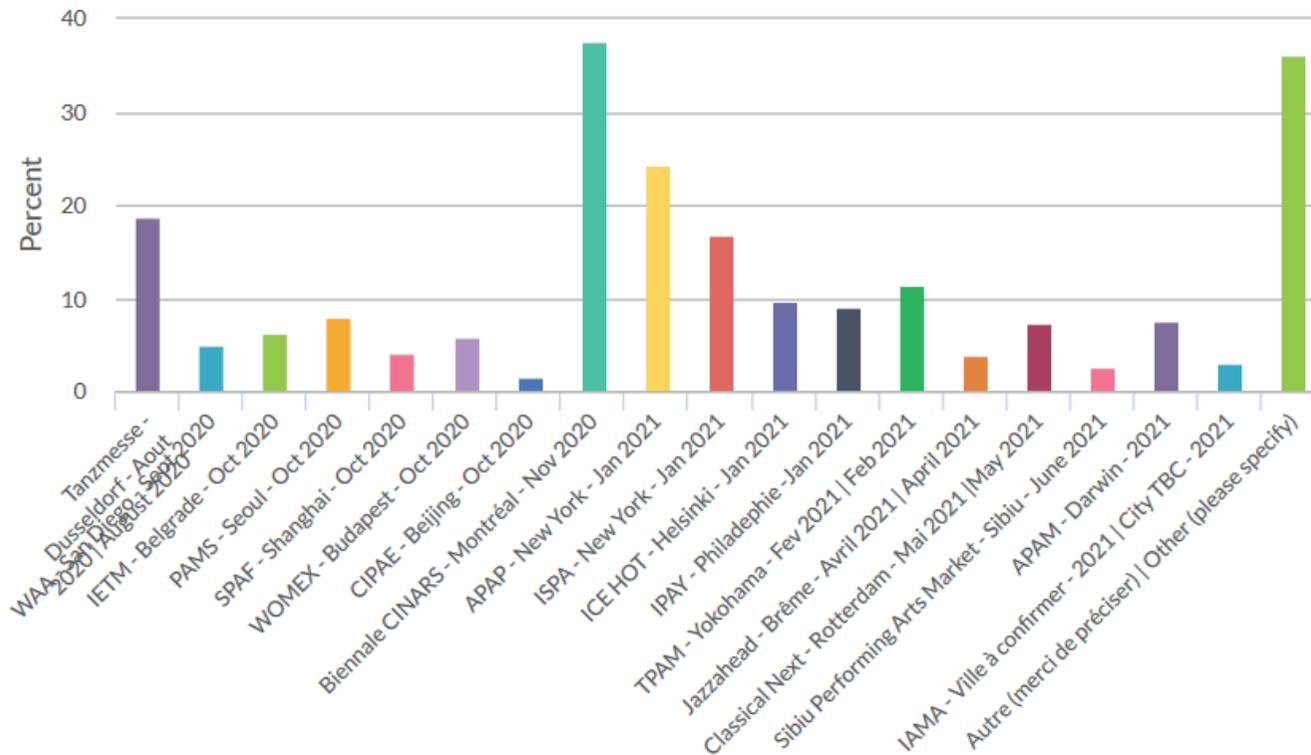
The vast majority, i.e. 84.4%, expect a return to normal in their prospection travel plans for 2022-2023. We believe that the recovery of economic activities in the various countries in the world over the next few months, will allow for the recovery of international business travel. It is required by the globalized economy. Therefore its return is necessary and imminent.

	Oui Yes	Non No	Responses
Saison 2020-2021 Season 2020-2021			
Count	671	66	737
Row %	91.0%	9.0%	
Saison 2021-2022 Season 2021 - 2022			
Count	341	396	737
Row %	46.3%	53.7%	
Saison 2022-2023 Season 2022-2023			
Count	115	622	737
Row %	15.6%	84.4%	
Totals			
Total Responses			737



QUESTION 6 : WHICH PROFESSIONAL EVENTS (CONFERENCES, CONGRESSES, MARKETS, FESTIVALS, ...) DO YOU PLAN TO ATTEND DURING THE 2020/2021 SEASON?

The CINARS Biennale event arrives at the top of the respondent's list, with 37.6 % of the votes. These results can be explained in part by the fact that this survey was sent to our network. With regards to the 36.3 % "Other", one third expects not to participate in any event. The two thirds remaining, intend to participate in many conferences, conventions and festivals throughout the world. The two names most mentioned are the Edinburgh and Avignon festivals in 2021.



QUESTION 7 & 8 : IS YOUR ORGANIZATION ALREADY THINKING ABOUT WAYS OUT OF THE CRISIS?
IF YOU HAVE ANY COMMENTS, CLARIFICATIONS AND/OR PROPOSALS TO BRING ON THE SUBJECT ?

We asked our respondents to give us their comments, as well as the solutions they are contemplating, to address the challenge they are currently facing. Therefore, upon assessing many comments, here is what we can glean from these testimonies:

- 50 % of the comments are alarming, as the respondents are concerned for the very survival of their organizations ;
- 25 % of the comments state that the respondents have no other options but to wait it out; that it is impossible to currently conceive of any solutions given the COVID-19 situation ;
- 25 % of the respondents shared avenues for solutions, questions, ideations and flexible strategies...

QUESTION 7 & 8 : IS YOUR ORGANIZATION ALREADY THINKING ABOUT WAYS OUT OF THE CRISIS? IF YOU HAVE ANY COMMENTS, CLARIFICATIONS AND/OR PROPOSALS TO BRING ON THE SUBJECT ?

The solutions and ideations that surface most often are :

- Postpone the programming and/or reduce the number of international shows ;
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- Call upon the support of governments for artists, companies, agents, programmers ;
- Ensure the maintenance of contact networks to survive the crisis over the next few months ;
- Diversify the various manners of show presenting:
 - Web presenting: maintaining audience engagement is beneficial, however it encountered considerable opposition, given the absence of protection of the creator's resale rights, as well as the absence of reasonable agreements regarding the means of broadcasting ;
 - In situ presentation: for instance in parks, providing that a climate of slight de-confinement prevails. Shows would be offered in parks, with certain social distancing measures put in place ;
 - Presentation of street shows, in which the audience views the show from balconies, thereby ensuring a real relationship with an audience naturally distanced in their residence.
- Simplify show design (more cost-efficient and more eco-friendly) ;
- Ensure better touring logistics in terms of carbon footprints ;
- Consolidation of organizations or forming associations in order to survive the crisis.



Given the results of the survey, despite the interruption of programming activities over the next few months, we must stress that 60.8 % of the professionals in the performing arts, hailing from countries scattered over the five continents of the world, expect a recovery of activities in 2021.

Until then, the entire economy of the performing arts is hardly at a standstill. On the contrary, everyone is working hard to ensure the earliest possible recovery.

This survey demonstrates the importance and the desire, within international networks, to keep programming works by foreign artists, now and forever. Furthermore, it testifies to the need for working together, along with the support of governments, to ensure the continued survival of cultural organizations.

Of paramount importance at this time, and for the months to come, is to maintain the business relationships that one has built, with the people in one's contact network. In this way, we can consolidate our activities in 2021. The results of this survey trumpet the need, now more than ever, to join forces, in one way or another, to share, to reflect, to meet and to discover works of international significance. In this manner, we will be able to negotiate programming agreements, as well as to develop new strategies for the dissemination of works in these uncertain times.