

# Recovery... or Transformation?

*National Alliance of Musical Theatres  
Fall Conference Plenary*

November 17, 2020

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P L A N N I N G  
& R E S E A R C H





# Land Acknowledgement

*We share this with you from  
Pequonnock, Paugussett, and  
Wappinger land  
(now Fairfield and New Haven)*

**Performing arts venues  
– “first to close, last to  
(fully) reopen”**



***Steven Wolff, Principal***



***Meg Friedman, Senior Consultant***



Susanna Gellert,  
Executive Artistic  
Director



Eric Keen Louie,  
Producing Director



Paul Stancato,  
Artistic Director





**When the tide goes out,  
you see the rocks that were  
already there**



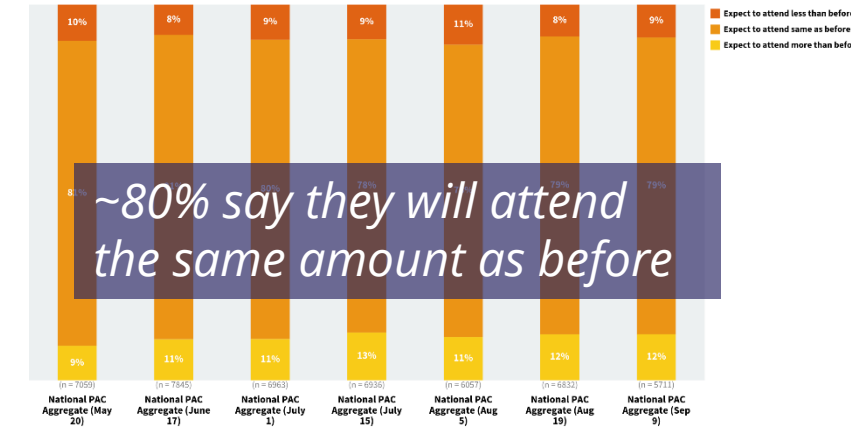


What does this  
mean for us?

# Audience loyalty is consistent.

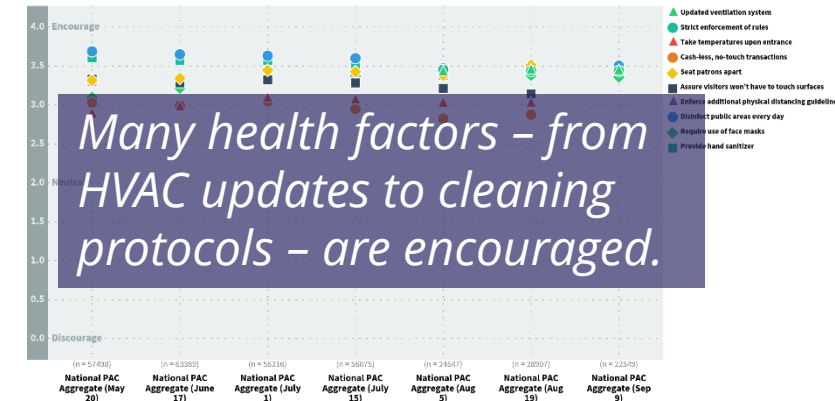
# Digital delivery and health and safety will stay a part of the mix.

How will your attendance at arts and cultural activities be affected by the pandemic in the long-term, given your personal circumstances?

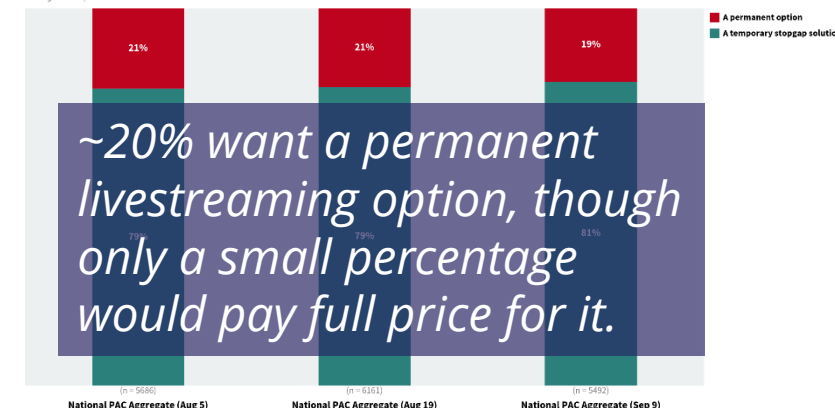


Health Risk Reduction Measures

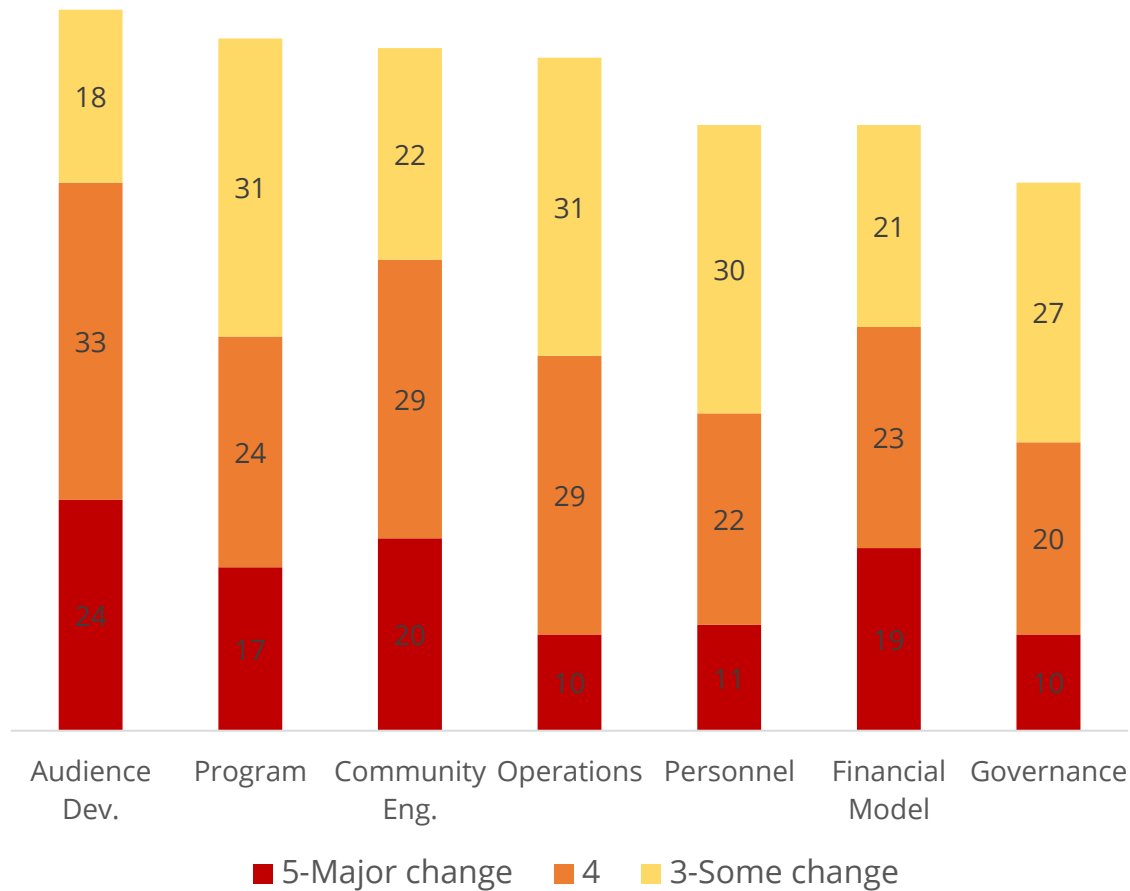
(Protocol v2 only includes Ventilation, Enforcement of Rules, Face Masks, and Disinfecting)



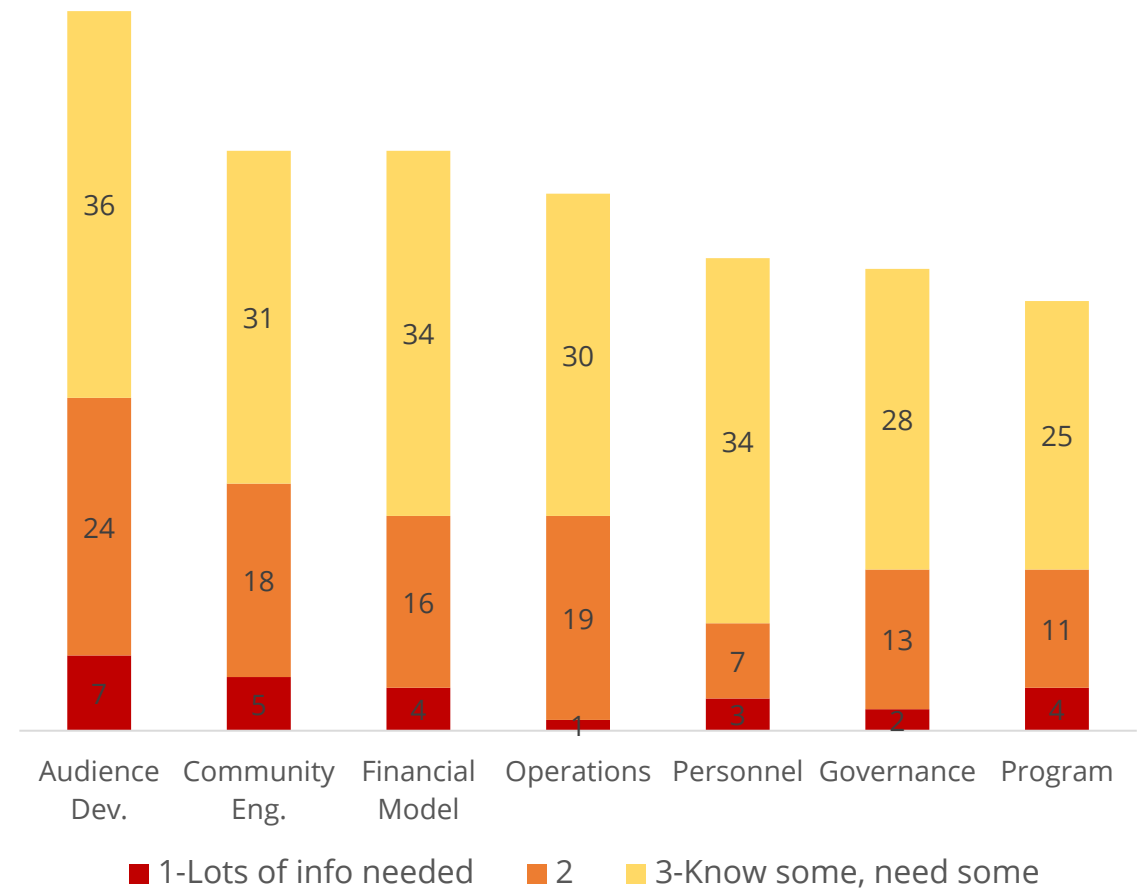
Do you think of the live stream option as a temporary stopgap measure, or as something that you might want to take advantage of on an ongoing basis even after venues are allowed to fully reopen?



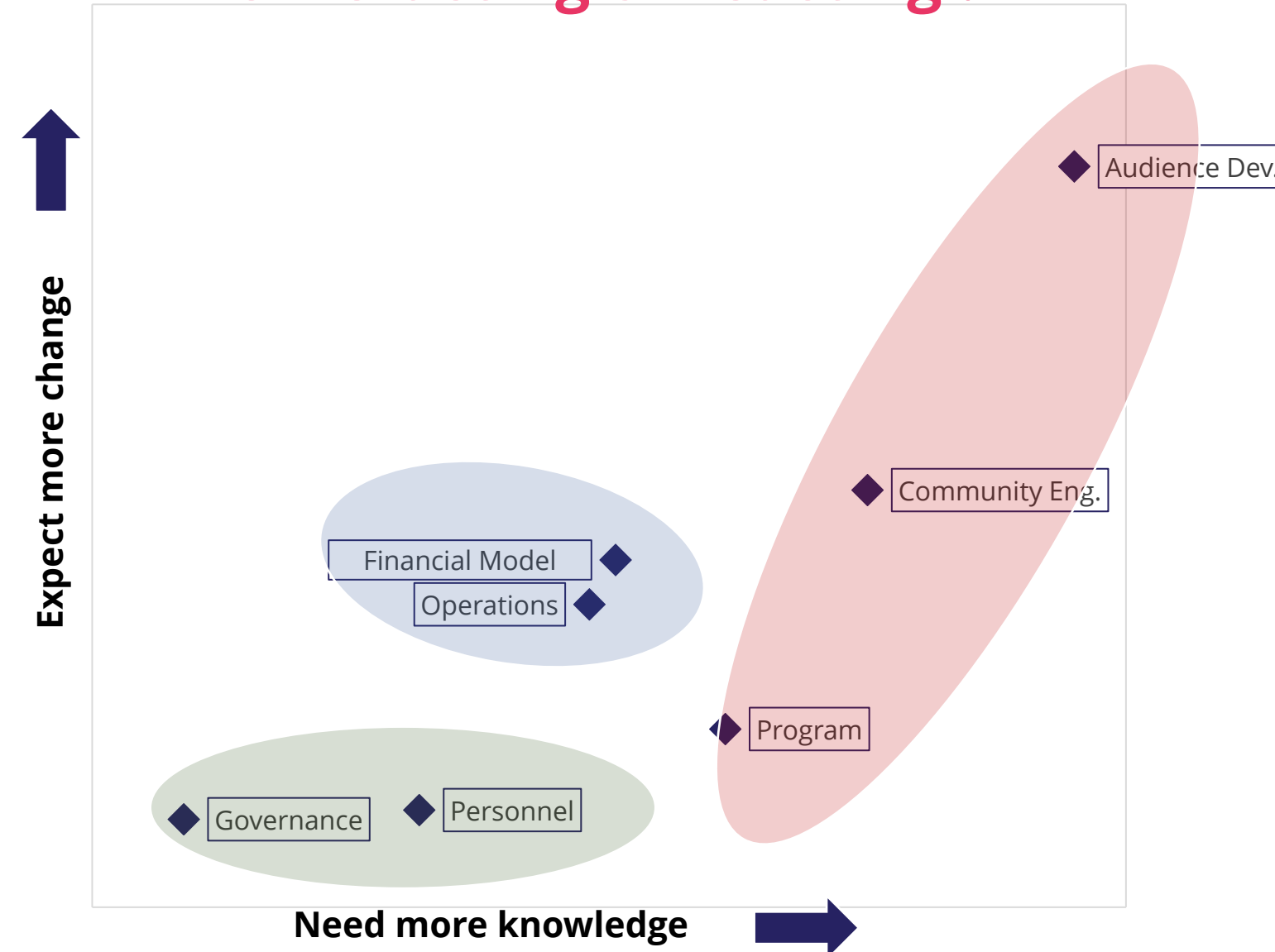
What aspect of your theater needs to change most, in response to the current time? (n=79+)



Do you/your colleagues know what you need to know in order to make that change? (n=76+)



## Are we 'acting or reacting'?



A survey of NAMT members asked what needs to change and whether organizations have the information they need to make the contemplated changes.

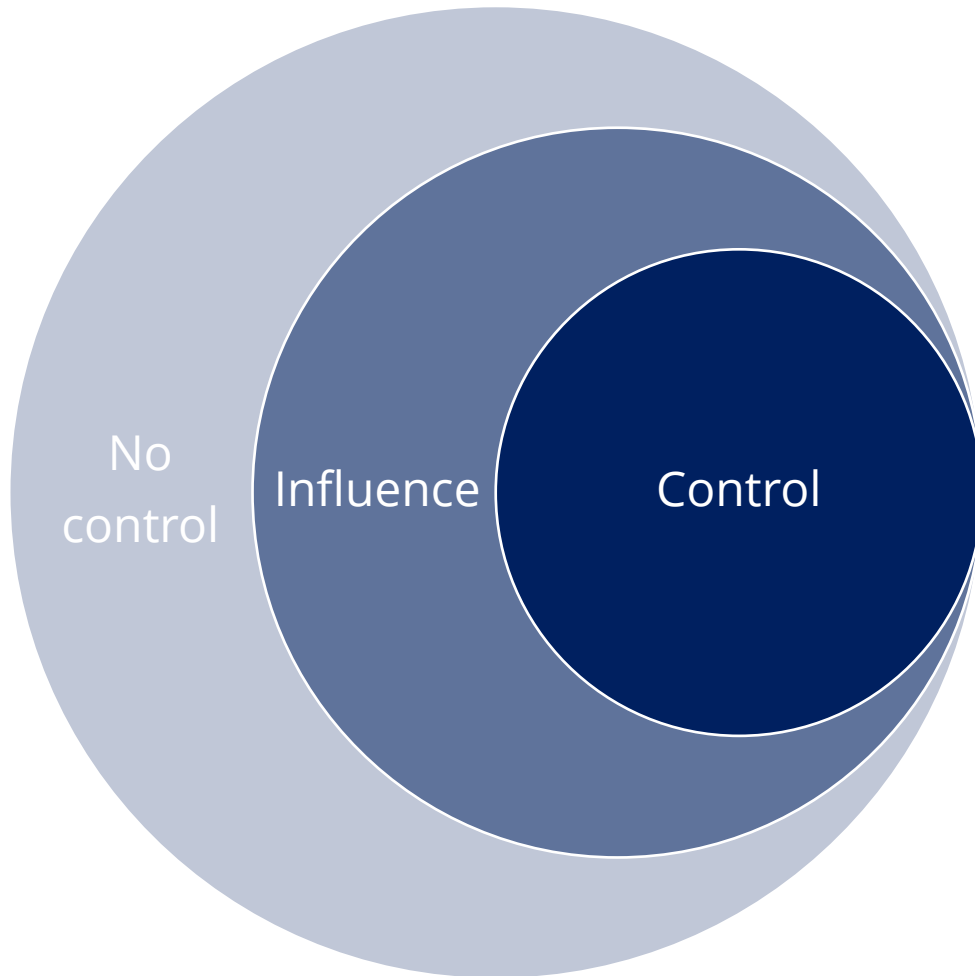
You said that **knowledge needs are focused on audiences** – connecting, cultivating, and serving them.

**Operational change is in the 'muddy middle'**, with some change anticipated and some knowledge deficits.

We have to call the question – **doesn't governance and personnel need to change as well?**



**We focus on things we can control, while welcoming (or accepting) the things we can't control.**



Building/venue usage  
Organizational branding  
Programming  
Organizational policies  
(Some) hiring

Consumer behavior  
Weather  
Financial markets  
Community health  
Tech sector innovation  
Competitive brands

New work development  
Artist training  
Arts funding  
Institutional partners  
Worker wellbeing  
Union oversight



The events of  
2020 have  
**accelerated**  
**changes** that  
were already  
underway.

- *Adoption of technology*
- *Consumer behavior*
- *Business collaborations*
- *Economic disparities*
- *Social and racial justice*
- *Redefining 'place'*



IMAGE: the New York Theatre Workshop opens its lobby to protesters.

# Ten years **in ten months.**

GAMING ENTERTAINMENT TECH

## Fortnite is launching a concert series it hopes will become a 'tour stop' for artists

It starts with Dominic Fike performing on Saturday

By Andrew Webster | Sep 8, 2020, 10:00am EDT

f t SHARE



HOME > FILM > NEWS

Oct 13, 2020 7:27p

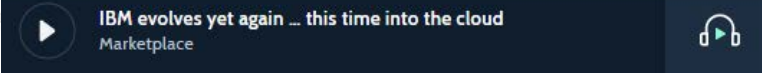
## Disney's Streaming Reorganization Cheers Investors but Confuses Insiders

By Matt Donnelly, Brent Lang

4



Michael Buckner/Variety



## IBM evolves yet again ... this time into the cloud

Kristin Schwab

Oct 9, 2020



IBM Executive Chairman Ginni Rometty delivers a speech at CES 2019 in Las Vegas. The company is pivoting to cloud services. Justin Sullivan/Getty Images



THE LONG RUNWAY

# Readiness to Return

A lot of 'moving parts' have to align





Recovery...  
or  
Transformation?



# What are the risks?

- *Changed habits / Competition*
- *Capitalization*
- *Financial operations*
- *Alignment*
- *Artistic risk*
- *Fatigue*





**The future will call for  
change**



Our assets  
have defined  
us



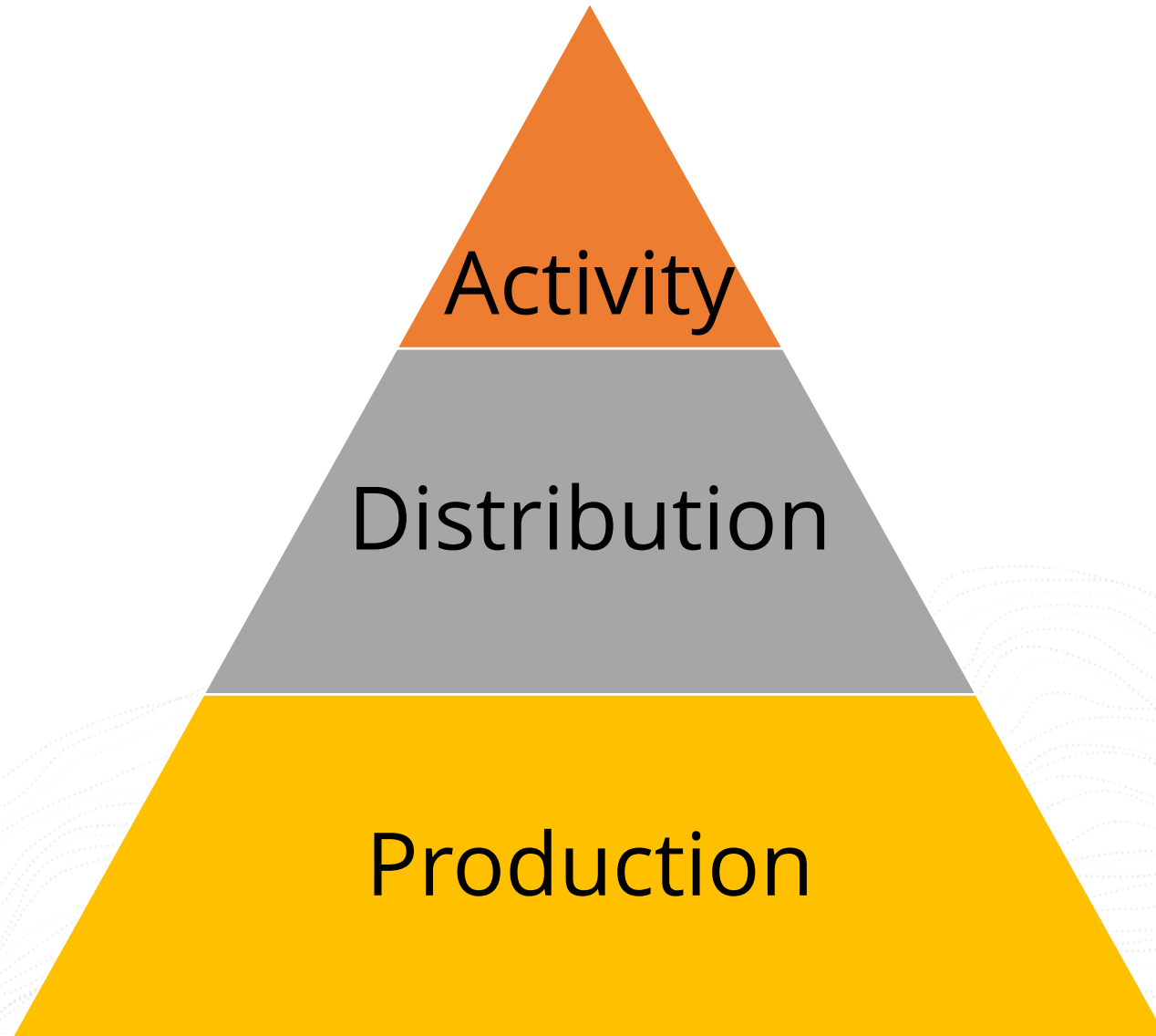
- In-person, real time
- Iconic venues
- Ticket sales-driven
- Dependent on 'popular' titles
- 'Producing' is vertically integrated
- Proscenium and thrust stages
- Limited amenities

# SWOT

Current Conditions reveal much

Strengths	Weaknesses
<b>Scale, visibility &amp; resources</b>	<b>Content dependent, diversity, capital</b>
Opportunities	Threats/Challenges
<b>Partnerships, local content, leadership</b>	<b>"The way it was..."</b>

**Where we  
were before**  
BEFORE



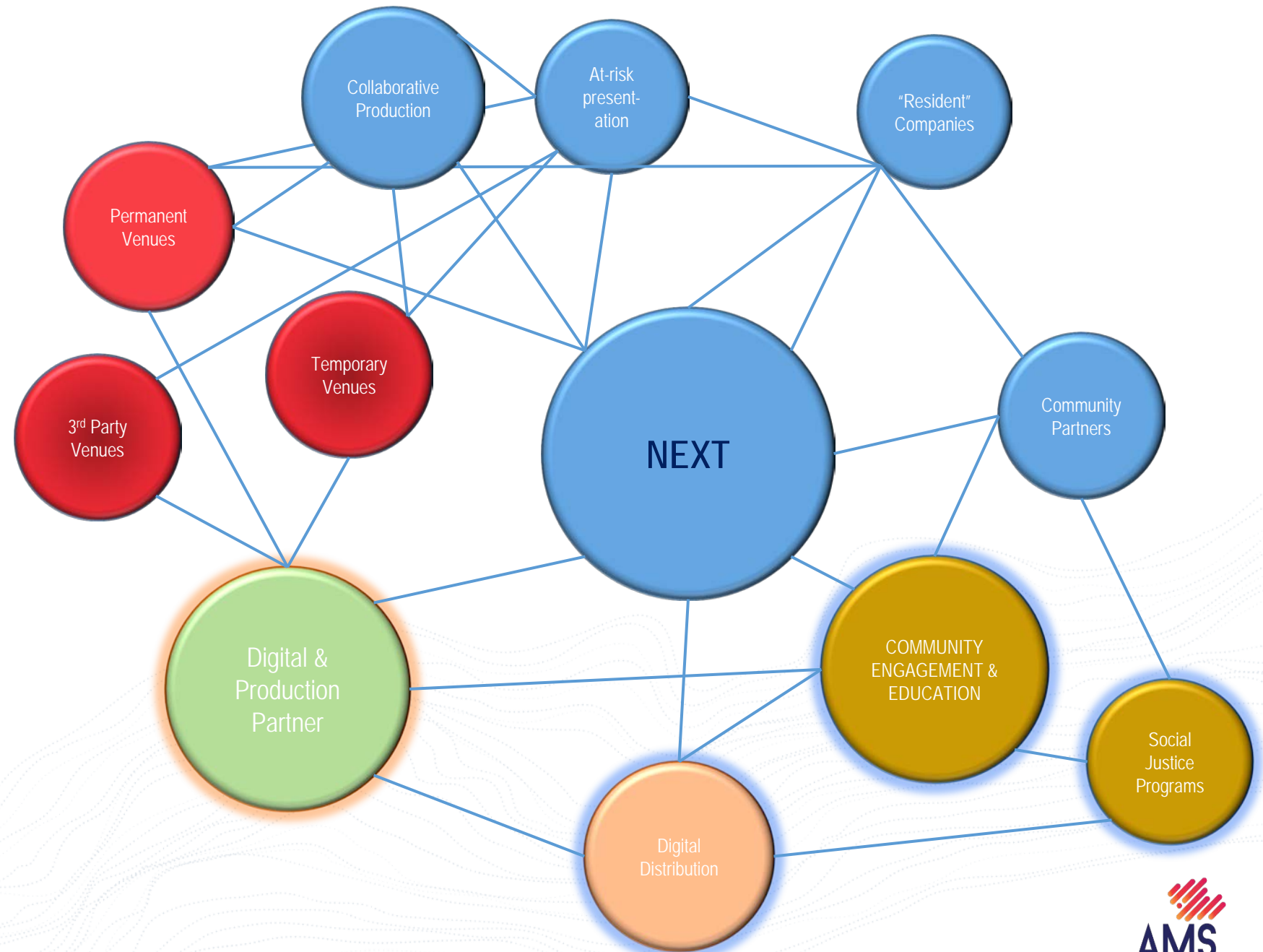
## NOW: Temporary or Permanent?

What does this mean for our venues?



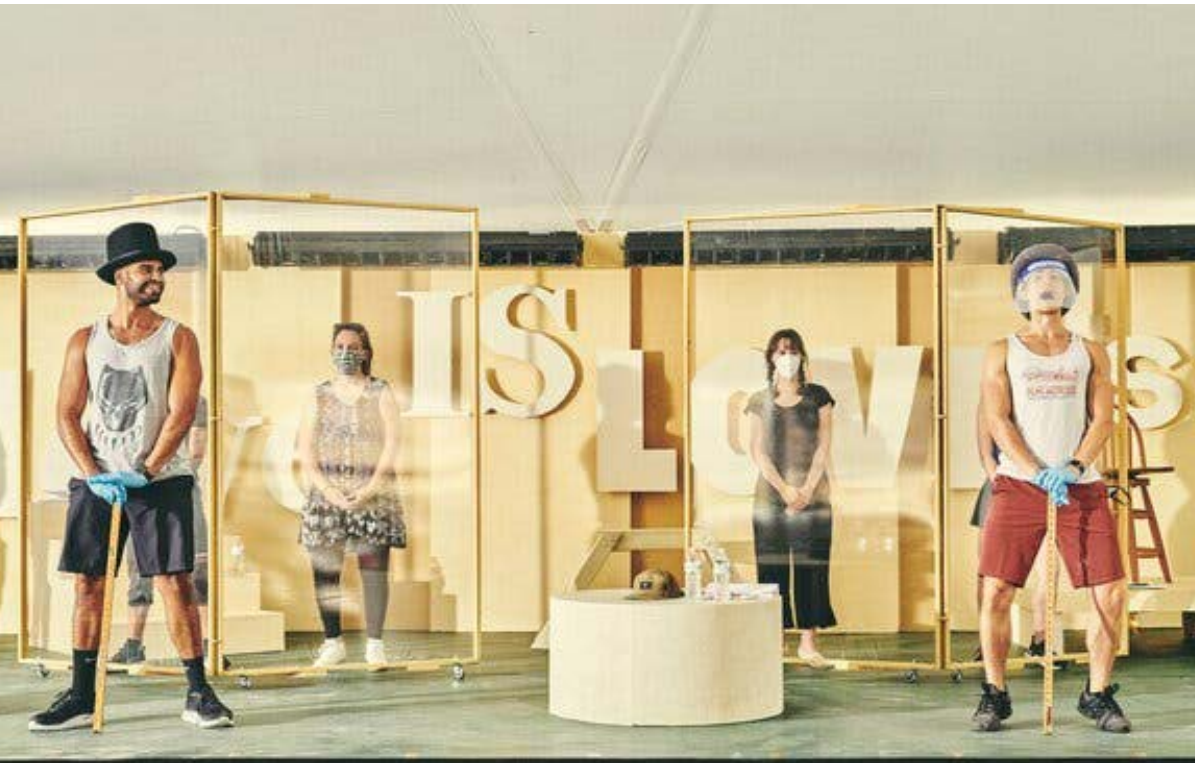
# NEXT

A network –  
broader and  
more deeply  
connected to  
community





# How might the business change?







***Steven Wolff, Principal***



***Meg Friedman, Senior Consultant***



Susanna Gellert,  
Executive Artistic  
Director



Eric Keen Louie,  
Producing Director



Paul Stancato,  
Artistic Director





# Panel Discussion

The background of the slide is a vibrant red-to-orange gradient. On the left side, there is a dark blue triangular shape. The right side of the slide features a series of white, wavy, dotted lines that create a sense of movement and depth.

Q&A



# Wrap-up

# Take-aways



- Communication improvements
  - Internally
  - With audiences
  - Among communities
- An accountable commitment to Equity, Diversity, Inclusion, Accessibility and Justice
- Extended / Expanded collaboration
  - Different kinds of delivery
  - Content innovation
- Leveraging digital but not relying on it
- Appreciating small successes

## Readiness

- Build on engagement
- Gather data
- explore new scenarios

## Recapitalization

- New value proposition
- New business models
- New partnerships.

## Resilience

- Stay engaged and connected.
- Focus on purpose.
- Challenge assumptions.

## Reimagination

- Design and implement a different future.

## Return

- Scale up
- Meet our communities where they are
- Over time.



**“... the first casualty  
of a crisis is  
imagination. But  
those that shape  
and benefit from  
the future will be  
those that can  
imagine it.”**

*Martin Reeves, Boston Consulting Group, April 2020*







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