The Strategic Counsel

Toronto Alliance for the Performing Arts
tapa.ca

A Presentation to the

Toronto Alliance for the Performing Arts

Members Survey

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Introduction and Methodology

Introduction and Methodology

- *The Strategic Counsel* is pleased to present findings of a survey of 92 member organizations of the Toronto Alliance for the Performing Arts (TAPA).

- Results are based on an online survey of TAPA members conducted between January 29 and May 4 2009. The survey was sent to 153 member organizations via an online distribution mechanism. Of these, 35 were unable to complete the survey for a variety of legitimate reasons. Of the 118 member organizations able to complete the survey, 92 did so. As such, the response rate is 78%.

- In December 2007, TAPA released the TAPA Stats Report which contained data for what is referred to as Wave I (collected for 2004/05 and 2005/06). Wave II represents data that was collected for the periods of 2006/07 and 2007/08.

- This survey constitutes a snapshot of the state of the performing arts community in Toronto. Given the nature of this survey, some of the variation that occurs between survey waves might not reflect changes in the whole performing arts community, but could be attributable to changes affecting a minority of TAPA members.

- Note: Proportions may not sum to 100% due to rounding.

Executive Summary

Executive Summary

- The TAPA members surveyed report having sold more than 2.4 million single and subscription tickets in the 2007/08 theatre season. The number of single tickets sold has increased by more than 262,000 from 2006/07, but is down 151,000 from 2005/06.
- Ticket/subscription sales are the single greatest stream of revenue for TAPA members, accounting for almost three-quarters (72%) of total revenue for 2007/08. Revenue streams point to a shift away from single ticket sales and towards subscriptions.
- In 2007/08, TAPA Members who reported their financial data indicate that total revenue generated exceeded $212,000,000.
- There has been a steady increase in the total number of individuals buying subscriptions to the artistic seasons of TAPA members. The total number of paid subscribers has increased from 84,673 in 2004/05 to 97,354 in 2007/08.
- TYA Mandated Companies produced programming for more than 90,000 students in 2007/08.
- TAPA Members surveyed employ over 6,000 individuals in varying capacities, of these 2,014 are employed full-time.
- TAPA members participate in a wide network of organizations and businesses that contribute to general economic health. More than half of TAPA Members (57%) participate in cross-promotions with local businesses. Of these, the average number of partnerships is 10.
- TAPA Members surveyed are optimistic about the future and more than three-quarters (78%) express a positive outlook. This optimism is notably hard with nearly two-fifths (38%) saying that they are “very positive.” Only 3% say that their view of the future is negative.

Detailed Findings

Types of Performances Produced by TAPA Members

- Consistent with 2005-06, TAPA member organizations continue to produce a wide array of live performances in the city of Toronto including theatre (75%), dance (20%) and opera (5%) in 2007-08.
- Member organizations also produce interdisciplinary performances as well as concerts, comedy, lectures, and community events.
- As in 2005-06, seven-in-ten TAPA members (71%) continue to indicate that theatre is their primary performance focus, while 12% report dance and 3% indicate that opera is their primary performance focus in 2007-08.
- Slightly more than one-in-ten (14%) member organizations report “other” types of performance as their primary focus, demonstrating a wide variety of artistic practice.

Types of Performances Produced by TAPA Members

	Total Sample Wave I	Total Sample Wave II
n=	86	92
	%	%
Theatre	72	75
Dance	22	20
Opera	6	5
Other	21	16
	0% 20% 40% 60% 80% 100%	0% 20% 40% 60% 80% 100%

Other		
	Wave I	Wave II
n=	18	15
	#	#
Music/Concerts	6	5
Multi/Interdisciplinary	4	4
Comedy	2	4
Lectures/Community events	2	-
Other	4	2

Q.A Which of the following types of live performance did your company produce in 2006-07 and/or 2007-08?
Base: Total respondents (n=92)
Note: Multiple mentions accepted

Primary Performance Focus of TAPA Members

	Total Sample Wave I	Total Sample Wave II
n=	86	92
	%	%
Theatre	70	71
Dance	14	12
Opera	3	3
Other	13	14

0% 20% 40% 60% 80% 100%

Other		
	Wave I	Wave II
n=	11	13
	#	#
Music/Concerts	3	4
Multi/Interdisciplinary	2	4
Comedy	2	3
Other	4	1

Q.B Which type of live performance is the primary focus of your organization?
Base: Total respondents (n=92)

TAPA Member Theatre Venues

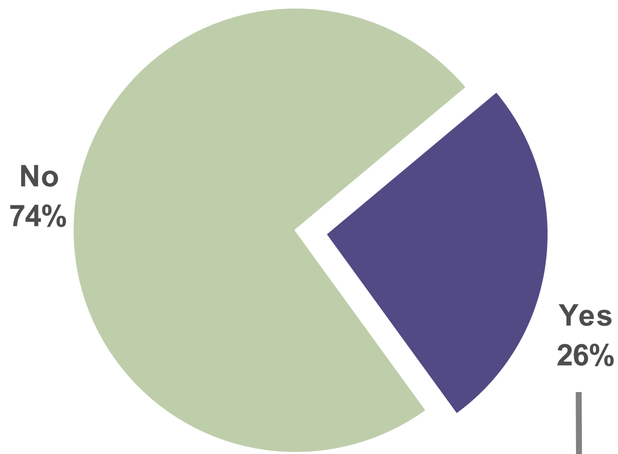
- Slightly more than one-quarter of TAPA member organizations (26%) operate a theatre. Among those organizations operating a theatre almost half (46%) operate a single theatre while slightly more than half (55%) operate multiple theatres. The number of theatres run by TAPA members operating multiple theatres varies between two and four.

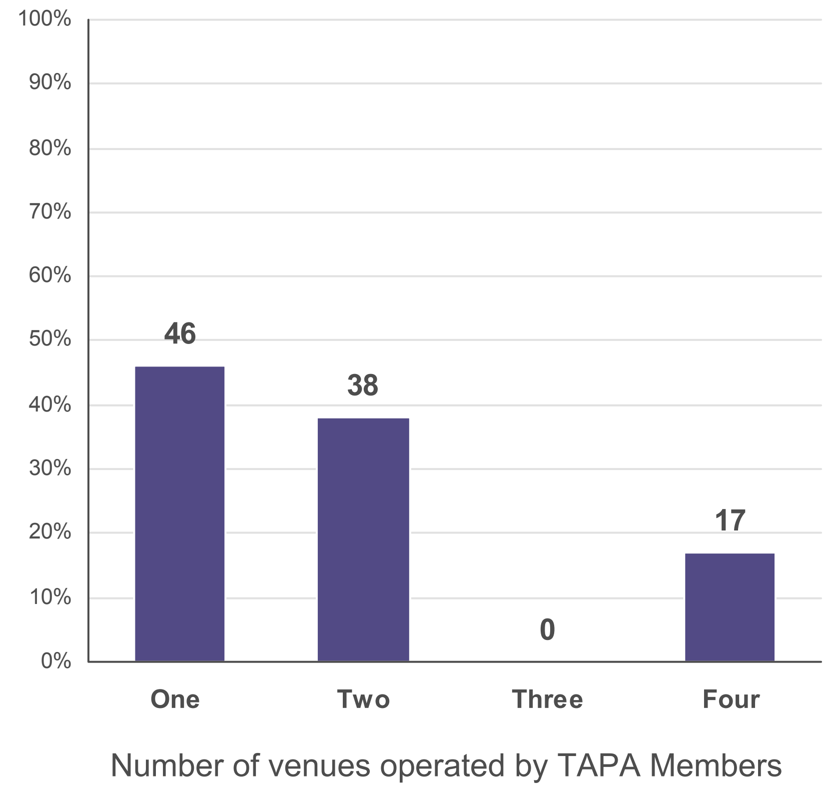
- Combined, the TAPA member organizations surveyed operate 45 different theatre venues and can seat over 28,000 individuals. The seating capacity of a typical venue operated by TAPA members is 220 seats. The size of theatres operated by TAPA members ranges from 55 seats to more than 3,000 seats.

- Given the fact that three-quarters (74%) of TAPA member organizations do not operate a theatre, a large number of members have rented theatres. In fact, three-quarters of TAPA members (76%) have rented theatres in the past to host productions. The median seating capacity of the theatre venues rented by TAPA members is 200.

- Over half of all TAPA members (55%) say that their theatre venues are only “somewhat suitable” for their productions. 62% say that the suitability of the theatre venues range from “very unsuitable” to “somewhat suitable.”

TAPA Member Theatre Venues





Number of venues operated by TAPA Members Surveyed
45
Median seating capacity of venues operated by TAPA Members
220

Q.1 Does your organization operate a theatre?
Base: Total respondents (n=92)
Q.2 How many theatres does your organization currently operate?
Base: Those organizations who operate a theatre (n=24)
Q.3 Please indicate the capacity for the theatre or theatres your organization currently operates.
Base: Those organizations who operate a theatre (n=24)

TAPA Member Theatre Venues - Rented

Median capacity of rented theatre venues
200

Q.4 Has your organization rented theatres in the past to host productions?
Base: Total Respondents.
Q.5 What is the average number of seats of the theatre venues that you typically rent?
Base: Those organizations who rented theatres in the past (n=70)

Suitability of Theatre Venues

Overall, how suitable or unsuitable is the theatre you typically use for your productions?	Total Sample Wave II	Theatre	Dance	Opera	Other
n=	92	65	11c	3c	13c
	%	%	%	%	%
Very unsuitable	3	2	0	0	8
Somewhat unsuitable	4	2	9	0	15
Somewhat suitable	55	61	64	33	23
Very suitable	38	35	27	67	54
Don't know/Refused	-	-	-	-	-

What is the main reason this theatre is unsuitable for your productions?	Those who said venue is unsuitable
	#
Repairs/ Renovations	1
Other Reason	5

Q.6 Overall, how suitable or unsuitable is the theatre you typically use for your productions?
Base: Total respondents (n=92)
Q.7 What is the main reason this theatre is unsuitable for your productions?
Base: Those organizations who reported that the theatre they typically use is unsuitable for their productions (n=6)
Caution: Small Base Size

Productions and Performances

- As in previous years, there is considerable variation among the TAPA membership with respect to the number of productions presented.
- The membership indicates that the number of productions is increasing.
  - In 2007-08 the proportion of TAPA companies presenting 2 or less productions is below half (46%) for the first time since tracking began.
  - There has been steady growth over the last four years in the proportion of TAPA Members that are producing three to five productions per year. Almost one-quarter (23%) report that they put on 3 to 5 productions in their 2007-08 year, compared to smaller proportions who put on 3 to 5 productions in 2006-07 (17%), 2005-06 (13%) and 2004-05 (12%).
  - The number of companies reporting that they have produced more than 6 productions has remained stable in 2007-08 at three-in-ten (31%).
  - The median number of productions in 2007-08 is 3. This represents an increase over all previous years where the median number of productions by TAPA member companies was 2.
- The total number of theatre productions increased from 1,111 to 1,140 productions between 2006/07 and 2007/08. This represents increases from 2004/05 when there were 762 productions and 2005/06 when there were 875 productions.
- The number of in-school and festival productions has decreased indicating a slight decline in total performances between 2006/07 and 2007/08. However, this could be due to changes in composition of the sample between the two waves.

Productions Presented by TAPA Member Organizations

	2004/05				2005/06			
	TOTAL	Theatre	Dance	Other	**TOTAL**	Theatre	Dance	Other
n=	**86**	60	12	14	**86**	60	12	14
	%	%	%	%	**%**	%	%	%
2 or Less	**57**	65	42	36	**55**	62	42	36
3 to 5	**12**	12	25	-	**13**	10	33	7
6 to10	**20**	17	17	36	**17**	18	17	14
More than 10	**11**	7	17	29	**15**	10	8	43
Median Number of Productions	**2**				**2**			

	2006/07				2007/08			
	TOTAL	Theatre	Dance	Other	**TOTAL**	Theatre	Dance	Other
n=	**92**	65	11	16	**92**	65	11	16
	%	%	%	%	**%**	%	%	%
2 or Less	**53**	63	27	31	**46**	52	27	31
3 to 5	**17**	15	27	19	**23**	25	27	13
6 to10	**19**	14	46	19	**16**	14	36	13
More than 10	**11**	8	0	31	**15**	9	9	44
Median Number of Productions	**2**				**3**			

Q.9 In the space provided below please indicate the number of productions your organization has presented in the each of the following theatre seasons.
Base: Total respondents (n=92)

Performances and productions

	2006/07		2007/08	
	Sum total	Percentage of Total	Sum Total	Percentage of Total
Total Productions	**1,535**	**100**	**1,493**	**100**
Total Festival Productions	260	17	237	16
Total School Productions	155	10	106	7
Total Theatre Productions	1,111	72	1,140	76
Total non-school/ non-theatre Productions (ie. Community centres, libraries, etc.)	9	1	10	1

Q.12 In the space provided below please indicate the number of productions your organization has presented in each of the following categories for the 2006-07 and 2007-08 theatre seasons…?
Base: Total Respondents (n=92)

In-theatre performances

- TAPA member organizations surveyed report a sustained and substantial increase in the number of performances they have delivered since the 2004/05 season.
- While TAPA members delivered more than 8,000 performances in both 2004/05 and 2005/06, they delivered over 11,000 in-theatre performances in both 2006/07 and 2007/08.
  - In 2006/07 member organizations delivered approximately 11,115 in-theatre performances.
  - In 2007/08 the member organizations surveyed delivered approximately 11,916 performances. Indicative of the substantial climb in in-theatre performances those organizations reporting that they presented 10 performances or less have fallen from three-in-ten (29%) in 2006/07 to slightly more than two-in-ten (22%) in 2007/08.
- The TAPA membership varies considerably in the number of in-theatre performances they present in a given year.
  - Slightly less than one-quarter (22%) delivers 10 or less performances per year, roughly the same (24%) deliver more than 100 performances. The majority (54%) delivers between 11 and 100 performances each year.

In-theatre performances Presented by TAPA Member Organizations

	2004/05	2005/06	2006/07	2007/08
	TOTAL	TOTAL	TOTAL	TOTAL
n=	86	86	82	82
	%	%	%	%
10 or Less	27	24	29	22
11 to 25	25	24	24	28
26 to 100	24	27	26	26
More than 100	22	25	21	24
DK/NA/Ref	2	-	-	-
Total Performances	8,277	8,752	11,115	11,916

Q.12 For all of your productions, how many performances took place in total in each of following categories during the seasons listed below.
Base: Respondents who do not perform exclusively in festivals, schools or non-school/non-theatre venues (n=82)
** Note: Question wording changed slightly from the previous wave of the survey (2004/05 and 2005/06).

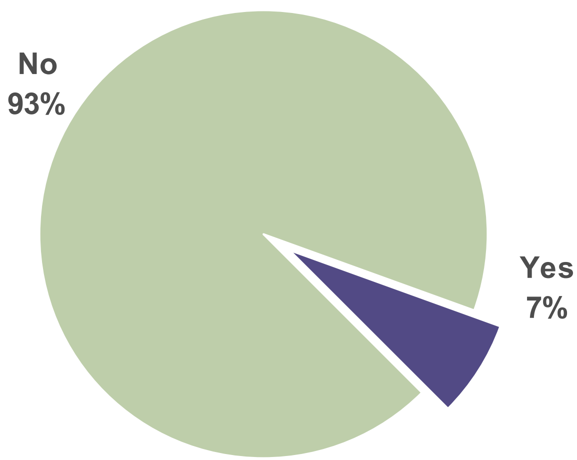
In School Performances and Productions

- While TYA Mandated organizations constitute a small proportion of TAPA member organizations surveyed, they produced programming for more than 90,000 students in 2007/08.
  - Less than one-in-ten (7%) TAPA Member organizations surveyed indicate that they are TYA Mandated.
  - The number of students who attended in-school performances rose substantially between the 2006/07 and 2007/08 seasons. In 2006/07, 83,500 students attended in-school performances compared to 90,750 in 2007/08.
- The number of students who attended non-school/non-theatre performances also rose from 7,110 to 7,300 between the 2006/07 and 2007/08 seasons.
  - Among those, 4 companies perform in schools and 3 companies perform in non-school/non-theatre venues such as community centres and libraries.

In School Performances and Productions

- More than half of the TYA Mandated companies surveyed indicate that more than 51% of the in-school and non-school-non-theatre venues used in 2007/08 were located in the City of Toronto.
- Most of the in-school venues were located in one of Toronto's 13 priority neighbourhoods for addressing at risk youth.
  - More than half of the TYA mandated companies who performed in schools report that greater than 50% of their in-school venues were located in one of these neighbourhoods.
- There is no single, dominant source of funding for in-school and non-school/non-theatre performances.
  - Among companies presenting in-school productions, an equal number indicate that their venues are usually paid for via student payments, school payments or grants.
  - Among companies presenting non-school/non-theatre productions, one company indicates that the school usually pays, while two companies indicate that the venues are usually paid for by grants

TYA Mandated Companies



Do you perform in…?	TYA Mandated Companies
	#
Schools	4
Theatres	6
Non-School/Non-Theatre venues, ie. Community centres, libraries	3

Q.9 Are you a TYA Mandated Company?
Base: Total respondents (n=92)
Q.10 Do you perform in…?
Base: Self-identified TYA Mandated Companies (n=6)

Percentage of in-school and non-theatre venues in Toronto

	2006/07		2007/08	
	Schools	Non School/ Non-Theatre	Schools	Non School/ Non-Theatre
	#	#	#	#
<50 Percent	1	0	1	0
51 Percent to 80 Percent	2	1	1	1
Greater than 81 Percent	1	2	2	2
Total number of students who attended performances	**83,500**	**7,110**	**90,750**	**7,300**

Q.23 For each year, what percentage of your schools and non-school/non-theatre venues were located in the City of Toronto?
Q. 25. Approximately, how many students attended your performances in schools and how many in non-school/non-theatre venues each year.
Base: Self-identified TYA Mandated Companies (n=6)

Percentage of in school non-school/non-theatre venues located in priority neighbourhoods for addressing at risk youth

	2006/07	2007/08
	#	#
< 50 Percent	1	1
50 Percent to 80 Percent	2	2
Greater than 81 Percent	1	1

Q.24 Thinking of all school and non-school/non-theatre venues, what percentage were located in Toronto's 13 priority neighbourhoods for addressing at risk youth – Jamestown, Jane-Finch, Malvern, Kingston-Galloway, Lawrence Heights, Steeles-L'amoreaux, Eglinton East-Kennedy Park, Crescent Town, Weston-Mt. Dennis, Dorset Park, Scarborough Village, Flemington Park-Victoria Village, Westminster-Branson.

Base: Self-identified TYA Mandated Companies who perform in schools (n=4)

Sources of payment for in-school and non-school/non-theatre performances

Paid By	**School**	**Non-school/Non-Theatre**
	#	**#**
Student	1	0
School	1	1
Grants	1	2
Other	1	0

Q.26. How are your performances in schools and non-school/non-theatre venues usually paid for?
Base: Self-identified TYA Mandated Companies (n=6)

Festival Performances

- Festivals constitute a significant activity for TAPA members surveyed.
  - Three-in-ten TAPA organizations report performing in a festival in 2006/07 (29%) and 2007/08 (32%).
  - The number of unique festival audience members totals more than 15,000 individuals.
  - There is an average of 1,316 unique audience members per TAPA member organization in 2007-08.
  - Among those TAPA members who performed in festivals in either year, more than two-in-five (43%) consider festivals part of their regularly scheduled season.
  - This proportion is consistent among companies who list their primary performance focus as theatre (44%), dance (40%) and “other” (43%).

- Festival activity has diminished somewhat in the 2007/08 season.
  - While participation in festivals is up (29% in 2006/07 to 32% in 2007/08), the total number of productions is down (260 in 2006/07 to 237 in 2007/08).
  - The total number of unique festival audience members has been cut in half from 32,969 in 2006/07 to 15,790 in 2007/08.

Festival Performances

Did your company perform in a Festival?	2006/07				2007/08			
	TOTAL	Theatre	Dance	Other	**TOTAL**	Theatre	Dance	Other
n=	**92**	65	11	16	**92**	65	11	16
	%	%	%	%	**%**	%	%	%
Yes	**29**	28	46	25	**32**	28	36	44
No	**71**	72	54	75	**68**	72	64	56

Are Festivals Part of your regularly scheduled Season?	2007/08			
	TOTAL	Theatre	Dance	Other
n=	**35**	23	5	7
	%	%	%	%
Yes	**43**	44	40	43
No	**49**	52	40	43
We Are a Festival	**9**	4	20	14

Approximately how many unique festival audience members attended your organization's performances…?	2007/08	
	2006-07	2007-08
	#	#
Average Number of Unique Audience Members	2,747	1,316
Total Number of Unique Audience Members	32,969	15,790

Q.11 Did your company perform in any festivals in the City of Toronto in the last two seasons?
Base: Total respondents (n=92)
Q.27. Are festivals part of your regularly scheduled season?
Base: Those who said that they perform in festivals for 2006/07 or 2007/08 at Q11 (n=35)
Q.28. A unique audience member is a patron who is counted only once regardless of the number of performances attended. Approximately how many unique festival audience members attended your organization's performances in the 2006-07 season? And in the 2007-08 season?
Base: Those who said that they perform in festivals at for 2006/07 or 2007/08 at Q11 (n=35)

Audience Members

- Between the 2004/05 and 2007/08 theatre seasons, there has been a net increase in the number of unique audience members (those who are counted only once regardless of the number of performances attended.)
- Between 2004/05 and 2007/08, the TAPA Membership averaged almost 25,000 unique audience members.
- Perhaps indicative of greater loyalty or increased reliance on subscriptions, the number of unique audience members has declined somewhat between 2006/07 and 2007/08.
  - The proportion of TAPA members who have 1,000 or less unique audience members has increased somewhat between 2006/07 (32%) and 2007/08 (36%).
  - The proportion of TAPA members who have more than 2,000 unique audience members has decreased somewhat between 2006/07 (47%) and 20067/08 (43%).

* These numbers should be analyzed with some caution given that between 2004/05 and 2007/08, four-in-ten to one-half of TAPA members don’t know how many unique audience members attended their performances.

Audience Members

- In 2007/08, 42% of TAPA members report total audience attendance has increased compared to 2006/07. By comparison, 33% who say that it stayed the same, and 25% report it decreased.

- For those companies whose total attendance increased, the average reported increase is 33%. For those companies who report a decrease in attendance, the average reported decrease is 35%.

- Compared to previous years, fewer TAPA members are reporting increases in attendance this past year.
  - The proportion of members seeing an increase in 2007/08 compared to 2006/07 (42%) is less than the proportion of members who saw increases in 2006/07 compared to 2005/06 (65%) and 2005/06 compared to 2004/05 (50%).

- Compared to the proportion of TAPA members who say that total attendance at their performances has declined (25%), a greater proportion of TAPA members report that attendance at their productions and performances has remained the same (33%).

Audience Members

- The performing arts offered by TAPA members is clearly a draw for audiences living outside the city of Toronto. This is evident because TAPA members report that on average, nearly one quarter (22%) of their audience members are from outside the city of Toronto. This is consistent with findings from 2005-06.

- Consistent with 2005-06, TAPA members report that, on average, 4% of their audiences are from outside of Canada.

* Once again, some caution should be given to these numbers as a majority of TAPA members did not know what percentage of their total audience is from outside Toronto or Canada.

Unique Audience Members

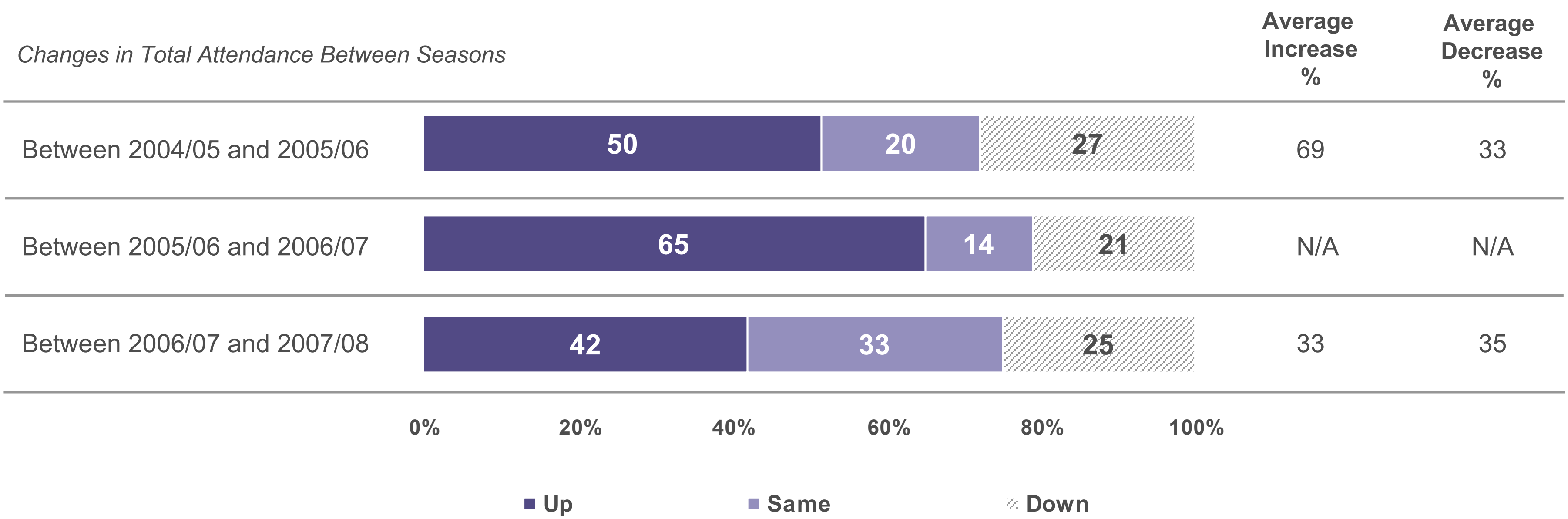
	Total Sample			
	Unique members 2004/05	**Unique members 2005/06**	**Unique Members 2006/07**	**Unique Members 2007/08**
n=	86	86	92	92
500 or Less	42	29	19	21
501 to 1000	15	25	13	15
1001 to 2000	12	16	21	21
2001 to 20,000	17	16	28	26
More than 20,000	15	14	19	17
DK/NA/Ref	44	43	49	49
4 Year Average	**24,271 Unique Audience Members**			
Median number of unique audience members	**900**	**1,000**	**2,000**	**1,500**

Q.14 A unique audience member is a patron who is counted only once regardless of the number of performances attended. Approximately how many unique audience members attended your organization's performances in the 2006-2007 season? And in the 2007-2008 season?

Base: Total respondents

Note: Percentages exclude "don't know" responses

Comparison of Total Attendance in 2004/05, 2005/06, 2006/07, 2007/08



Q.20 Compared to the 2005-2006 season, was your total attendance up, down or the same for the 2006-2007 season?
Q21. Compared to the 2006-07 season, was your total attendance up, down or the same for the 2007-08 season?
Q.22 By what percentage is your attendance [insert response to Q.14] for the 2007-2008 season?
Base: Total respondents (n=92)

Location of Audience Members

	Location of Audience Members			
	Outside City of Toronto 2005-06	Outside City of Toronto 2007-08	Outside Canada 2005-06	Outside Canada 2007-08
n=	39	40	34	35
	%	%	%	%
10 percent or Less	44	40	94	94
11 percent to 25 percent	28	30	3	-
26 percent to50 percent	15	20	3	3
More than 50 percent	13	10	-	3
DK/NA/Ref	55	57	61	62

	Average 2005-06	Average 2007-08
	%	%
Outside City of Toronto	22	22
Outside Canada	4	4

Q.18 What percentage of your total audience is from outside the City of Toronto? Please note that all patrons whose postal code does not begin with the letter “M” are to be considered from outside the City of Toronto.
Q.19 And what percentage of your total audience is from outside of Canada?
Base: Total respondents
Note: Percentages exclude “don’t know” responses.

Single Tickets and Subscriptions

- Consistent with the 2005-06 season, nearly three-quarters (72%) sell single tickets only.
  - This figure excludes those who perform exclusively in festivals, schools and non-school/non-theatre venues.
- The remainder (28%) sell subscriptions in addition to single tickets.
  - A greater proportion of TAPA member dance organizations (40%) sell both single tickets and subscriptions compared to TAPA member theatre organizations (25%) who sell both.
  - In addition, slightly more than one-third (36%) of TAPA members whose primary performance type is neither theatre nor dance sell both.
- In each of the past four seasons, TAPA members surveyed have sold more than two million single tickets. In 2007/08 more than 2.3 million tickets were sold, up more than 262,000 from 2006/07, but down more than 151,000 from 2005/06. However, there is a net increase of over 60,000 tickets sold from 2004/05. On average, TAPA members sold almost 29,000 tickets in the 2007/08 season, up 3,245 from 2006/07, but down slightly from a high of 30,003 in the 2005/06 season.
- There has been a steady increase in the total number of individuals buying subscriptions to the artistic seasons of TAPA members. The total number of paid subscribers has increased from 84,673 in 2004/05 to 97,354 in 2007/08.

Single Tickets and Subscriptions

	Total Wave I	Total Sample Wave II	Theatre	Dance	Other
n=	86	81	57	10	14
Single Tickets only	74	72	75	60	65
Single Tickets and Subscriptions	26	28	25	40	36

Q.15 Does your organization sell single tickets only or does it also sell subscriptions?
Base: Respondents who do not perform exclusively in festivals, schools or non-school/non-theatre venues (n=82)

Non-Festival, Non-in-School Single Tickets and Subscriptions

	2004/05	2005/06	2006/07	2007/08	Change Between 2006/07 and 2007/08	Change Between 2004/05 and 2007/08
n=	81	83	81	81	-	-
Number of Single Tickets Sold	2,276,526	2,490,208	2,075,624	2,338,335	+ 262,711	+61,809
Average Number of Single Tickets Sold	28,105	30,003	25,625	28,868	+3245	+763
Median Number of Tickets Sold	1,200	1,500	1,440	1,800	+360	+600

	Number of Paid Subscribers
	#
2004/05	84,673
2005/06	85,626
2006/07	91,462
2007/08	97,354
Difference Between 2006/07 and 2007/08	5,892
Difference Between 2007/08 and 2004/05	12,681

Q.16 How many (non-festival/non-in-school))paid single tickets were sold by your organization in both the 2006-2007 and 2007-2008 seasons?
Base: Those organizations that report selling single tickets @Q15 (n=81)
** Note: This wave (2006/07 and 2007/08) asked about non-festival/non-in-school single tickets. The previous wave (2004/05 and 2005/06) asked about single tickets generally.
Q.17 How many paid subscribers belonged to your organization in each of the seasons listed below?
Base: Those organizations selling paid subscriptions @Q15 (n=20)
Note: Number of Paid subscribers excludes a significant outlier that was reported in previous waves.

Revenue Sources for TAPA Member Organizations

- TAPA members have a number of revenue streams such as ticket sales, fundraising, government grants and endowments.
- In 2007/08, TAPA Members who reported their financial data indicated that total revenue generated exceeded $212,000,000. This represents an increase from 2006/07, but does not quite reach the high of 2005/06.
- Revenue streams point to a shift away from single ticket sales and towards subscriptions.
  - Single ticket sales have steadily decreased from 84% of total ticket sales in 2004/05 to 71% of total ticket sales in 2007/08, while subscriptions have increased as a proportion from 16% to 29%.
- While ticket sales continue to be the leading source of revenue, they have declined in relation to fundraising.
  - Fundraising has increased from 11% in 2004/05 to 17% in 2007/08, while ticket sales have declined from 77% in 2004/05 to 72% during the same time period.

Revenue Sources for TAPA Member Organizations (Cont'd)

- While fundraising as an aggregate total has increased somewhat between 2006/07 and 2007/08, the plurality of TAPA members indicate that fundraising has stayed the same or gone down.
  - More than half indicate that corporate donations (55%) and foundation grants (54%) have stayed the same.
  - A sizeable proportion indicate a decline in endowments (74%), sponsorships (63%) and special event revenues (60%).
- However, TAPA members who made increases in fundraising indicate sizeable gains, compared to the size of the losses.

* This slide should be taken with caution as it is based on estimates and perceptions rather than actual numeric data.

Revenue Sources for TAPA Member Organizations

	2004/05		2005/06		2006/07		2007/08	
	TOTAL		TOTAL		TOTAL		TOTAL	
	$	% of Total	$	% of Total	$	% of Total	$	% of Total
Grand Total	**194,170,749**	**100**	**218,926,160**	**100**	**201,986,211**	**100**	**212,744,001**	**100**
Ticket Sales	**148,788,801**	**77**	**169,318,149**	**77**	**146,566,475**	**72**	**152,314,318**	**72**
Single Ticket Sales	125,617,009	84	141,266,930	83	108,557,784	74	108,133,613	71
Subscription Sales	23,171,792	16	28,051,219	17	38,008,691	26	44,180,768	29
Fundraising	**21,254,903**	**11**	**23,650,547**	**11**	**34,108,042**	**17**	**36,072,874**	**17**
Individual Donations	9,940,238	47	11,310,593	48	16,240,279	48	15,422,140	43
Corporate Donations	1,883,950	9	1,227,339	5	1,824,150	5	1,404,508	4
Sponsorships	4,753,078	22	5,047,918	21	8,291,155	24	10,257,555	28
Foundations	1,988,800	9	2,223,795	9	3,463,263	10	4,661,183	13
Special Events Net Revenue	2,688,837	13	3,840,902	16	2,610,253	8	2,765,961	8
Endowments	n/a	n/a	n/a	n/a	1,678,942	5	1,561,527	4
Government Grants	**24,127,045**	**12**	**25,957,464**	**12**	**21,311,694**	**11**	**24,356,809**	**11**
City	4,418,848	18	4,734,078	18	4,453,191	21	6,178,425	25
Provincial	6,739,832	28	6,951,946	27	5,744,762	27	6,001,823	25
Federal	12,968,365	53	14,271,440	55	11,113,741	52	12,176,561	50

Q.29 In the spaces provided below, please list your total revenue from each of the following sources for both the 2006-2007 theatre season
Q30 In the spaces provided below, please list your total revenue from each of the following sources for both the 2007-2008 theatre season
Base: Among those who reported their financial information. Base sizes vary.

Comparison of Grants, Endowments, Sponsorships and Donations Over Two Seasons

	Change Compared to 2006/07	Average Increase or Decrease (%)
	%	%
Corporate Donations		
Increase	22	144
Remained the Same	55	N/A
Decrease	22	43
Foundation Grants		
Increase	29	97
Remained the Same	54	N/A
Decrease	16	39
Government Grants		
Increase	34	75
Remained the Same	21	N/A
Decrease	46	31
Individual Donations		
Increase	34	74
Remained the Same	25	N/A
Decrease	41	35
Special Event NET Revenues		
Increase	24	124
Remained the Same	16	N/A
Decrease	60	36
Endowments		
Increase	5	157
Remained the Same	20	N/A
Decrease	74	39
Sponsorships		
Increase	25	43
Remained the Same	12	N/A
Decrease	63	38

Q.30 For each of the following, please indicate if the contributions are up, down or the same for the 2007-2008 theatre season, compared to the 2006-2007 season.
Base: Total respondents.

Number of Artistic and Non-Artistic Employees

- The performing arts industry in Toronto employs a substantial number of artistic and non-artistic staff.
  - TAPA Members surveyed employ over 6,000 individuals, of these 4,079 are employed part-time. 2,014 are employed full-time.
- Compared to 2005/06, a greater proportion of TAPA member employees are full-time artistic staff in 2007/08.
  - The proportion of part-time non-artistic staff has dropped from 31% to 18% between 2005/06 and 2007/08.
  - The proportion of full-time artistic employees has risen from 5% in 2005/06 to 16% in 2007/08.
- The number of non-artistic employees has declined since 2005-06. This is mainly attributable to a decline in part-time staff.
  - The number full-time non-artistic employees has declined somewhat from 1,175 in 2005/06 to 1,042 in 2007/08.
  - The number of part-time staff in 2007/08 (1,113 non-artistic part-time employees) has nearly been halved since 2005-06 when TAPA members retained 2,360 non-artistic part-time staff.

Number of Artistic and Non-Artistic Employees

	Total 2005-2006	Total 2007-08
n=	86	92
	#	#
Non-Artistic Employees		
Full-time	15%	17%
Part-time	31%	18%
Total	**3535**	**2155**
Artistic Employees		
Full-time	5%	16%
Part-time	49%	49%
Total	**4183**	**3938**
Grand Total	**7718**	**6093**

Q.31 In the spaces provided below please indicate the number of non-artistic full-time and part-time staff currently employed by your organization. Please include yourself. NOTE: Full-time includes those working an average of 30 hours or more per week.
Q.32 Now please indicate the number of individual artistic staff (including all contracts) who have worked for your organization on a full-time or part-time basis for the 2007-2008 season.
Base: Total respondents

TAPA Member Advertising

- TAPA members advertise in a variety of different mediums throughout the world.
  - One-third (34%) market their productions to potential audiences outside of the GTA. Among this group 39% advertise in Ontario outside of the GTA, 20% advertise in the United States, 13% advertise in Canada outside of Ontario and 10% advertise internationally excluding the United States.
  - Half advertise on radio (49%) and in magazines (54%), while substantial proportions use web media (85%), newspapers (84%) and cross-promotions (80%).
- Consistent with 2005/06, virtually all (92%) use post cards and posters, the most prevalent form of advertising used by TAPA members surveyed.
- Between 2005/06 and 2007/08 TAPA members substantially increased their use of web media for advertising (73% to 85%). They also increased their use of television (15% to 23%), radio (42% to 49%).
- NOW Magazine continues to be the most widely used newspaper for TAPA member advertising (81%) where, on average, TAPA members spend more than half (56%) of their paid newspaper advertising budget with NOW Magazine. NOW Magazine is followed by the Globe and Mail (39%) and the Toronto Star (39%) as having the largest share of TAPA Members' print media budgets.
- Between 2005/06 and 2007/08, TAPA members were more likely to advertise in the Globe and Mail (34% to 42%) and the "Other" category (33% to 44%). "Other," where TAPA members typically spend two-fifths of their advertising budget, is likely community newspapers.

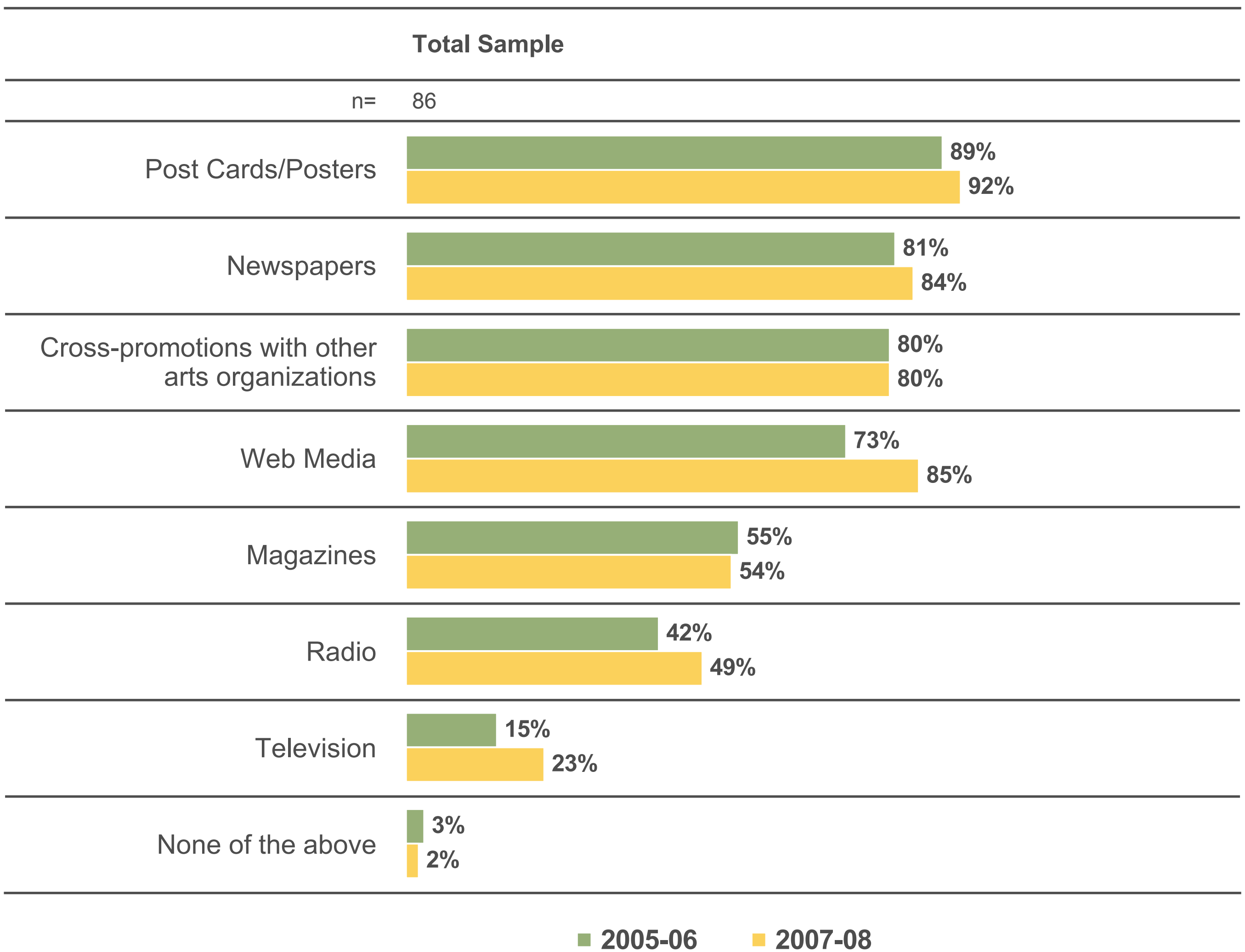
Percentage of TAPA Members Who Engage in Marketing Outside of the GTA

	Marketing locations outside of Toronto*
n=	31
	%
GTA	39
Ontario Outside of the GTA	39
Canada outside of Ontario	13
Canada (General)	10
United States	20
International (outside of US)	10
Other / Not Specified	16

** Multiple Mentions Accepted*

Q.41 Do you do any marketing outside of the GTA?
Base: Total respondents
Q42 If so, where?
Base: Respondents who do marketing outside of the GTA (n=31)

TAPA Member Advertising Mediums



Q.38 Which of the following mediums, if any, have you used to advertise in the past year?
Base: Total respondents

TAPA Member Newspaper Advertising

	Newspaper Advertising 2005-06	Newspaper Advertising 2007-08	% of total PAID newspaper advertising
NOW Magazine	81%	81%	56
The Globe and Mail	42%	34%	39
The Toronto Star	38%	40%	39
Eye Weekly	35%	31%	22
The Toronto Sun	12%	9%	2
National Post	6%	9%	2
Other	33%	44%	43

Q.39 In which of the following newspapers has your organization advertised in the past year?
Q.40 What percentage of your total paid advertising is spent with the following?
Base: Among those who advertise in newspapers (n=77)
Note: Multiple mentions accepted

TAPA Member Website Usage, Web Media and Social Media

- Website Usage amongst TAPA members has remained consistent since the 2005/06 season.

- As with previous years, it is not entirely clear how much traffic is visiting these websites.
  - When asked how many hits per week their websites were receiving seven-in-ten (68%) TAPA members with websites did not know.

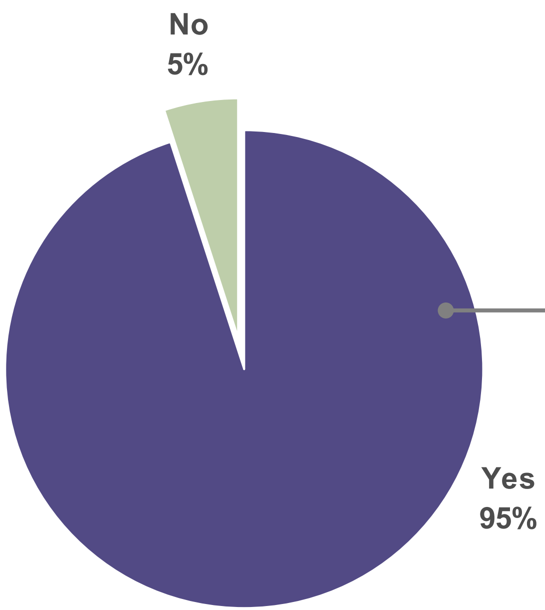
- TAPA members are reaching out to potentially interested parties through the internet.
  - 95% of TAPA member organizations have their own website.

- Among TAPA members with websites, 7 percent report receiving more than 50,000 website hits per week, 5 percent report receiving 5,001 to 50,000 hits per week and one-in-five (22%) report receiving less than 5,000 hits per week.

TAPA Member Website Usage, Web Media and Social Media

- When it comes to sales, TAPA members are making better use of their websites compared to previous years.
  - In 2007/08 37% of TAPA members surveyed have the ability to sell tickets online, compared to 26% who were able to do so in 2005/06.
  - In 2007/08 three-quarters (75%) of those can sell tickets in real time directly from their inventory, up from 71% in 2005/06.
- TAPA members are making extensive use of new media and social media to promote and attract business.
  - Nearly all TAPA members surveyed (92%) use social networking media to promote and attract business.
  - More than half (55%) allocate between 1% and 20% of their marketing budgets to new media, while one-fifth (19%) allocate 21% or more.

Website Use Among TAPA Members

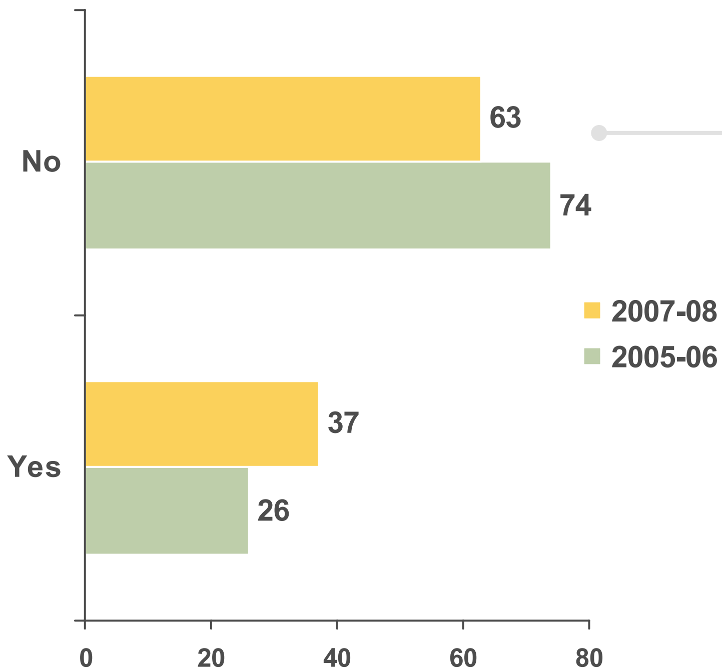


	Website hits per week 2005-06	Website hits per week 2007-08	Unique hits per week 2005-06	Unique hits per week 2007-08
	%	%	%	%
5,000 or Less	20	22	15	17
5,001 to 50,000	5	5	5	3
More than 50,000	7	6	1	0
DK/NA/Ref	68	68	79	79

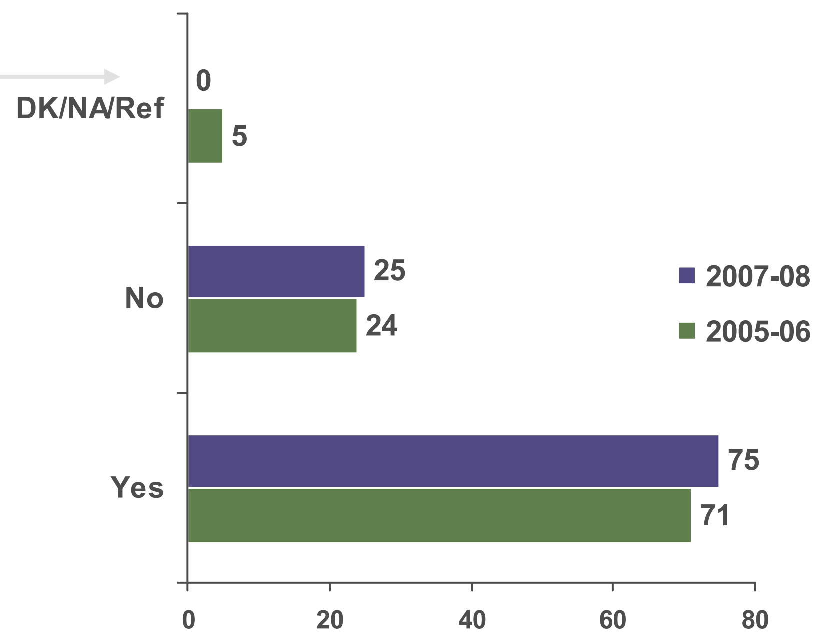
Q.45 Does your organization have its own website?
Base: Total respondents (n=92)
Q.46 In an average week, how many hits does your website receive?
Q.47 And how many unique visitors does your organization's website receive in an average week? A unique visitor is a visitor who is counted only once despite the number of times they access your organizations website.
Base: Those organizations that have a website (n=87)

Website Use for Selling Tickets Among TAPA Members

Ability to Sell Tickets Online



Ability to Sell Tickets in Real Time Directly from Inventory



Q.48 Do you sell single tickets or subscriptions for your productions on your website?
Base: Those organizations that have a website (n=87)
Q.49 Does your organization currently have the ability to sell single tickets and/or subscriptions in real time directly from your inventory?
Base: Those organizations that sell single tickets or subscriptions on their website (n=21)

Use of New Media and Social Networking Media Among TAPA Members

	Proportion of Marketing Budget allocated to new media
	%
0 percent	11
1 to 10 percent	35
11 to 20 percent	20
21 to 40 percent	9
41 to 60 percent	5
More than 60 percent	5
DK/NA/Ref	15

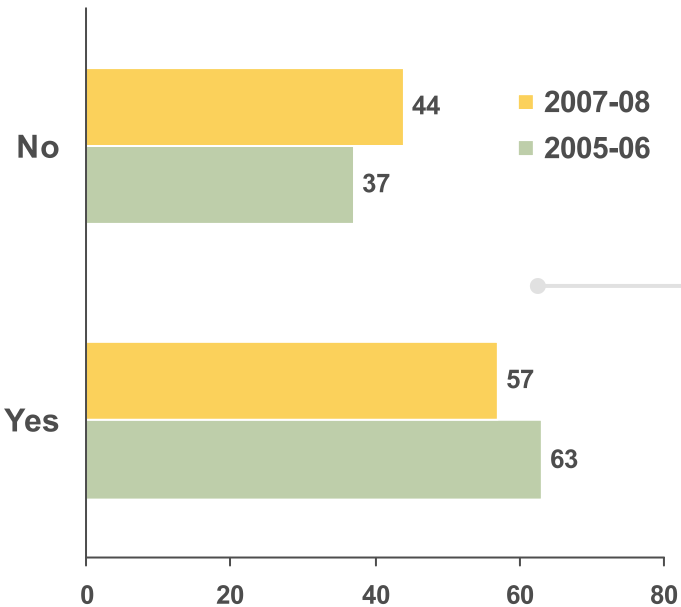
	Use of social networking media to promote/attract business
	%
Yes	92
No	8

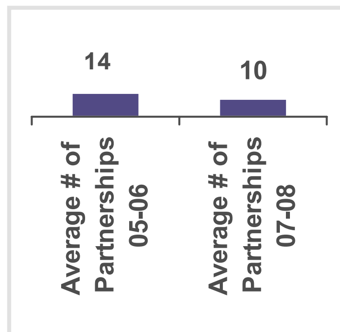
Q.43 What percentage if any of your total marketing budget is allocated to new media such as e-marketing, podcasts, blogs banner ads, etc.?
Base: Total Respondents (n=92)
Q.44 Does your organization use social networking media such as Facebook or MySpace to promote/attract business?
Base: Total Respondents (n=92)

Partnerships and Cross-Promotions

- More than half of TAPA members (57%) participate in cross-promotions with other local businesses.
- TAPA members participate on average in 10 different partnerships and cross-promotions. The most common type of partnership is with restaurants (67%), followed by other theatres (56%) and other live venues (33%).
- However, compared to 2005/06, TAPA members appear to be engaged in fewer cross-promotions that are more targeted to strengthening relationships with restaurants, museums and tourism in 2007/08.
  - The average number of cross-promotions has dropped from 14 cross-promotions to 10 cross-promotions between 2005/06 and 2007/08.
  - The proportion of cross-promotions that occur with other theatres is down from 69% in 2005/06 to 56% in 2007/08. Additionally, the proportion of cross-promotions with other live performance venues is down from 39% in 2005/06 to 33% in 2007/08.
  - Cross-promotions with restaurants (52% to 67%) and museums (13% to 25%) are up substantially between 2005/06 and 2007/08.
  - Cross-promotions with Tourism Toronto is also up from 25% to 31%.

Partnerships and Cross-Promotions





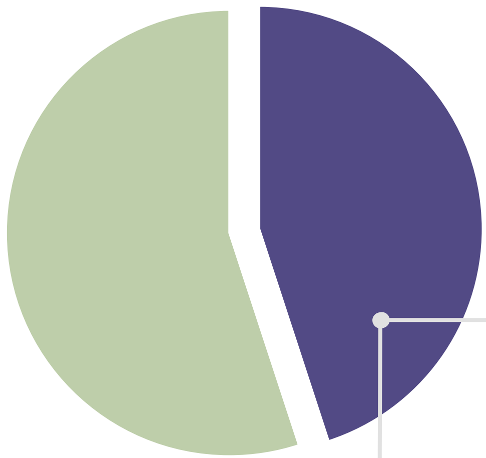
Partnership or Cross-Promotion with…		
	05-06	07-08
n=	54	52
	%	%
Other theatres	69	56
Restaurant	52	67
Other live performance venue	39	33
Local charity	33	31
Tourism Toronto	25	31
Museum	13	25
Parking lot	4	6
Other	50	39

Q.50 Does your organization participate in any partnerships or cross-promotions with other local businesses?
Base: Total respondents (n=92)
Q.51 With how many local businesses does your organization currently have an existing partnership or cross-promotion?
Q.52 With which of the following types of businesses, if any, does your organization currently have a partnership or cross-promotion?
Base: Those organizations who participate in any partnerships or cross-promotions with other local businesses (n=52)

High School Performances

- TAPA members are reaching out to high schools and providing cultural experiences to young people. Nearly half (45%) of TAPA members surveyed have designated high school matinee performances.
- In 2007/08, 5,039 high school groups attended performances by TAPA members.
- There has been a steady increase in the number of high school groups attending TAPA members' performances.
  - In fact the number of high school groups attending performances has doubled between 2004/05 and 2007/08 from 2,469 groups to 5,039 groups.
  - The average number of high school groups has increased significantly as well, from 29 groups to 55 groups.
  - The proportion of TAPA members who report that more than 51 high school groups attended their performances has risen from 6% in 2004/05 to 14% in 2007/08.

High School Performances



Number of high school groups who attended a performance			
2004/05	2005/06	2006/07	2007/08
2,469	2,808	3,787	5,039
Average number of high school groups who attended a performance			
29	33	41	55

Number of high school groups who attended a performance				
	2004/05	**2005/06**	**2006/07**	**2007/08**
n=	86	86	92	92
	%	%	%	%
5 or Less	69	66	71	64
6 to 50	23	23	18	21
51 to 100	2	4	4	3
More than 100	4	5	7	11
DK/NA/Ref	2	2	-	-

Q53. Do you have designated high school matinee performances?
Base: Total respondents (n=92)
Q.54 How many high school groups, if any, attended one of your organization's performances in each of the following theatre seasons?
Base: Total respondents (n=92)

Touring

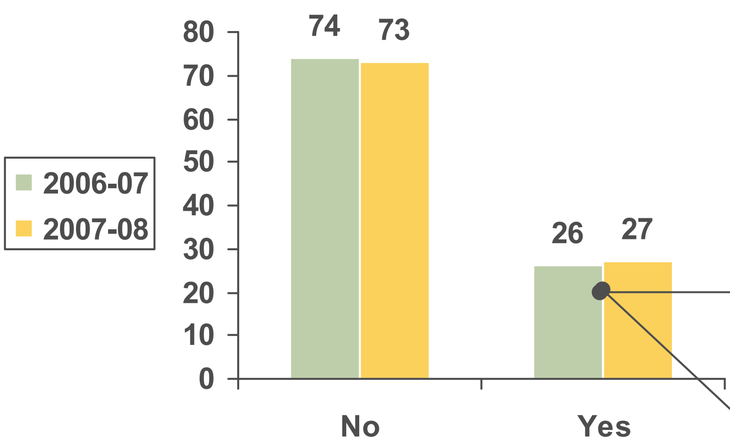
- For many TAPA members, touring is an important part of their activity/season.
  - In 2007/08 one quarter (27%) toured.
  - TAPA Members produced a total of 54 tours, spanning 474 venues while on tour.
  - On average, TAPA members conducted two tours and reached 19 venues while on tour.
- TAPA members tour throughout Canada, the United States and Internationally.
- Between 2006/07 and 2007/08, the number of tours to the United States and Internationally declined somewhat, but the number of tours throughout Canada (outside of Ontario) grew substantially.
  - Those who toured were less likely to go to the United States (33% in 2006/07 down to 20% in 2007/08). They were also less likely to tour internationally outside of the US (29% in 2006/07 to 20% in 2007/08).
  - Touring in Canada outside of Ontario rose dramatically from 54% of those who toured in 2006/07 to 76% in 2007/08.

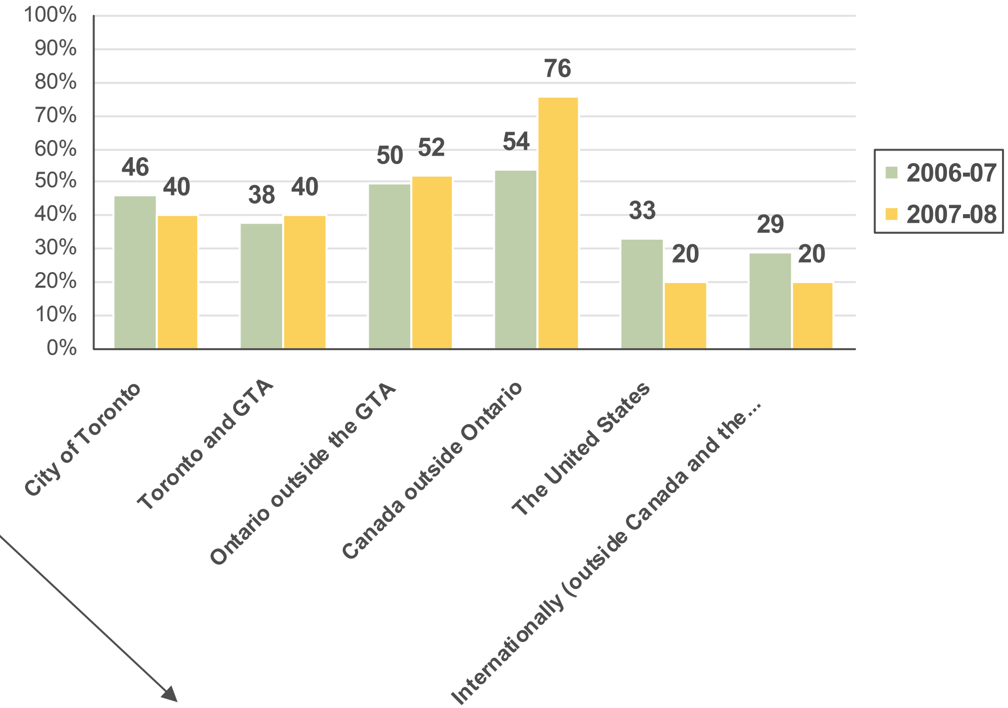
Touring (Cont'd)

- TAPA members are most likely to tour throughout Canada.
  - Three quarters of those who toured in 2007/08 (76%) toured through Canada outside of Ontario, 52% toured through Ontario outside the GTA, and 40% through Toronto and the GTA.

- Compared to 2006/07, TAPA members reported that they drew substantially less money for touring from ticket sales in 2007/08, while continuing to rely heavily on presenter fees.
  - On average, TAPA members who toured in 2007/08 report that ticket sales dropped substantially as a proportion of the total cost of touring (27% to 17%).
  - Presenter fees continued to make up one-quarter of the cost of touring (27% to 24%).

Touring





Number of Tours		Number of Venues performed in while on tour	
2006-07	2007-08	2006-07	2007-08
57	54	479	474
Average Number of Tours		Average # of Venues performed in while on tour	
2006-07	2007-08	2006-07	2007-08
2	2	20	19

Q33. Did your company tour in 2006-07 and 2007-08?
Base: Total respondents (n=92)
Q34. Where did you tour?
Q35. How many tours did you make in each year?
Q36. In total, how many venues in each year did you perform while on tour?
Base: TAPA Members who companies toured in 2006-07 (n=24) and 2007-08 (n=25)

Touring (cont'd)

What percentage of the total cost of touring came from the following sources?	**2006-07**	**2007-08**
n=	24	25
	Average %	Average %
Ticket Sales	28	17
Guaranteed Fees / Presenter Fees / Performance Fees	27	24
Federal Government	8	12
Provincial Government	11	10
City	2	3
Foundations	3	4
Fundraising	7	9
Other	51	46

Q37. What percentage of the total cost of touring came from the following sources?
Base: TAPA Members who companies toured in 2006-07 (n=24) and 2007-08 (n=25).

Looking Forward

- TAPA members indicate that their biggest challenges for the future are ticket sales and declining tourism (62%) and general money and financing issues (45%).

- TAPA Members surveyed are optimistic about their future.
  - More than three-quarters (78%) say they are positive about the future. This optimism is notably hard with nearly two-fifths (38%) saying that they are "very positive."
  - Only 3% say that their view of the future is negative.

Looking Forward

How would you best describe the company's views about the future?	**Total Sample**
n=	92
	%
NET Positive	**78**
Very positive	38
Somewhat Positive	40
Uncertain	19
Somewhat Negative	1
Very Negative	2
NET Negative	**3**

Q54. Thinking ahead the next year or two, how would you best describe the company's view about the future?
Base: Total Respondents.

Looking Forward

Top three challenges	Total Sample
n=	92
	%
Ticket Sales/ Filling Audience / Declining Tourism	62
Money/funds/finances/budget/operating expenses (general)	45
Staffing Issues	37
Private Fundraising	36
Receiving Government Funds / Funding	34
Declining Economy (General)	20
Need new / better / larger venue / Venue issues	20
Other / DK / Ref	40

Q55. What are the three biggest challenges the company faces over the next year or two?
Base: Total Respondents.

Toronto Alliance for the Performing Arts

Launched in 1980, the Toronto Alliance for the Performing Arts (TAPA) is an arts service organization, representing nearly 200 professional theatre, dance and opera companies in the City of Toronto, including commercial and not-for-profit companies.

The Toronto Alliance for the Performing Arts:

- Brings together the disciplines of theatre, dance and opera to celebrate and strengthen the performing arts as a whole in Toronto;
- Promotes and advocates on behalf of a large and diverse membership base of professional performing arts practitioners to legislators, public and private sector funding bodies, and to the general public; and
- Provides exceptional marketing opportunities and professional development services to its membership.

TAPA also supports a network of associate members and partners consisting of industry suppliers, managers, publicists, ticket agencies, educational institutions, training studios, talent and casting agents, and works with other related businesses through partnerships with various BIA's and Toronto attractions and other national and provincial arts service organizations.

Programs and services provided by TAPA include the **T.O. TIX Booth—Toronto's One-Stop Ticket Shop** at Yonge-Dundas Square and online at www.totix.ca; the **Dora Mavor Moore Awards**; **5 STAR EXPERIENCE Theatre & Dining Packages**, Toronto's official **Theatre Guide**, featuring comprehensive listings for theatre, dance and opera performances & theatre map; **hipTIX**, offering $5 tickets to students between the ages of 15 and 29, **citySPECIAL**offering tickets to at-risk communities and at-risk youth, and the **Commercial Theatre Development Fund**. For more information visit www.tapa.ca and www.totix.ca.

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