The Strategic Counsel

A Report to the
Toronto Alliance for the Performing Arts

Members Survey

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Introduction and Methodology

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- *The Strategic Counsel* is pleased to present findings of a survey of 80 member organizations of the Toronto Alliance for the Performing Arts (TAPA).
- Results are based on an online survey of TAPA members conducted between October 4, 2011 and February 14, 2012. The survey was sent to 186 member organizations via an online distribution mechanism. 38 TAPA member organizations were not in a position to complete the survey. Among the 148 member organizations able to complete the survey, 80 did so. As such, the response rate is 54%. This is a lower response rate than in previous years, in part due to a greater number of smaller organizations that have joined TAPA and who were eligible but unable to complete the survey.
- The sample of survey respondents is comprised of a mix of not-for-profit and for-profit TAPA member organizations.
- In December 2007, TAPA released the TAPA Stats Report which contained data for what is referred to as Phase I (collected for 2004/05 and 2005/06). In April 2009, TAPA released Phase II of the TAPA Stats Report (collected for the 2006/07 and 2007/08 theatre seasons). This report summarizes data for Phase III, collected for the periods of 2008/09 and 2009/10.
- 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 phases might not reflect changes in the whole performing arts community, but could be attributable to changes affecting a minority of TAPA members.
- Consistent with Phase I and Phase II, the survey results primarily represent companies with larger revenues and audiences, and are not necessarily reflective of the experiences of companies with smaller revenues and audiences.
  - The response rates for companies with less than $750,000 in revenue is 41%
  - The response rate for companies with more than $750,000 in revenue is 88%
- Note: percentages throughout the report may not sum to 100% due to rounding.

Executive Summary

Executive Summary

- TAPA members surveyed continue indicate that single ticket sales are stable. Consistent with normal fluctuations in ticket sales reported since 2004/05, TAPA members surveyed indicate that they sold over 2.2 million single tickets in 2009/10.
- Ticket sales are being augmented by a steady year-over-year increase in the total number of individuals buying subscriptions. The total number of paid subscribers has increased from 84,673 in 2004/05 to 132,455 in 2009/10. This constitutes a 56% increase between 2004/05 and 2009/10. While the number of subscriptions has increased, revenue from subscriptions has declined from previous years. Thus, the greater number of subscriptions are likely the result of reduced prices and greater flexibility for the subscriber.
- Students remain an important constituency for TAPA members. There has been a steady year-over-year increase in the number of high school groups attending TAPA members' performances. In fact, the number of high school groups attending has more than tripled between 2004/05 and 2009/10 from 2,469 groups to 8,798 groups.
- Overall, TAPA members report a total of 34 venues with a combined total seating capacity of 24,576.
- In 2009/10, TAPA members indicated that total revenue generated exceeded $216 million.
- In response to a softening of ticket sales, companies were successful in increasing their fundraising efforts. TAPA members reported strong increases in individual and corporate fundraising (from $21 million in 2004/05 to $38 million in 2009/10), as well as government grants (from $24 million in 2004/05 to $35 million in 2009/10).

Executive Summary (cont'd)

- Compared to previous phases of research, TAPA members surveyed are significantly more likely to be actively engaged in partnerships and cross-promotions with local businesses. In fact, more than three-quarters of TAPA members participate in such cross-promotions.
- Overall, TAPA members are largely optimistic about the future. More than three-quarters of TAPA members report that their views of the future are positive.

Detailed Findings

Types of Performances Produced by TAPA Members

- As reported in TAPA Stats Reports Phase I and II, TAPA member organizations continue to produce live performances in a variety of disciplines, including Theatre (78%), Dance (19%) and Opera (8%).
- Consistent with past years, roughly three-quarters report that their primary performance focus is Theatre (78%), while nearly one-in-ten (9%) indicate that Dance is their primary focus. A smaller percentage of TAPA members (5%) report that their primary performance focus is Opera.
- Slightly fewer than one-in-ten (8%) 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 Phase I	Total Sample Phase II	Total Sample Phase III
n=	86	92	80
	Title %	Title %	Title %
Theatre	72	75	78
Dance	22	20	19
Opera	6		8
Other	21	16	14

Q.A Which of the following types of live performance did your company produce in 2008-09 and/or 2009-10?
Base: Total respondents (n=80)
Note: Multiple mentions accepted

Primary Performance Focus of TAPA Members

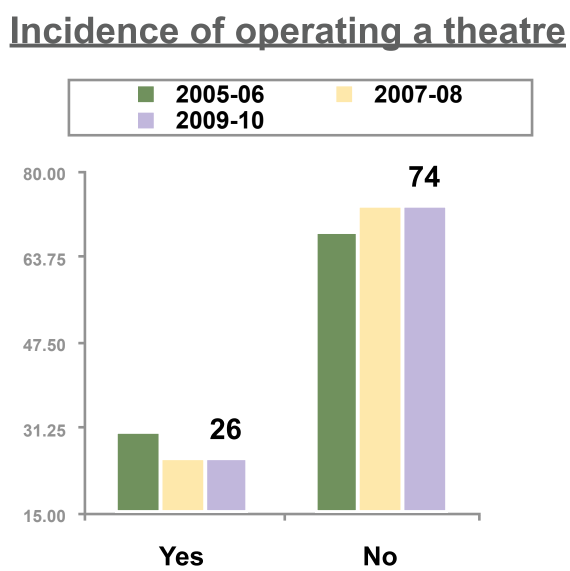
	Total Sample Phase I	Total Sample Phase II	Total Sample Phase III
n=	86	92	80
	Title %	Title %	Title %
Theatre	70	71	78
Dance	14	12	9
Opera	3	3	
Other	13	14	8

Q.B Which type of live performance is the primary focus of your organization?
Base: Total respondents (n=80)

TAPA Member Theatre Venues

- Compared to the previous phase of research, there has been minimal variation in the usage and operation of theatre venues. Slightly more than one-quarter of TAPA member organizations (26%) operate a venue.
- Combined, TAPA Member Organizations surveyed seat nearly 25,000 individuals. The size of theatres operated by TAPA members ranges widely from 40 seats to nearly 3,200.
- A substantial majority of TAPA members surveyed (83%) have rented theatres in the past to host productions. The median seating capacity of the theatre venues rented by TAPA members is 171.
- Overall, 61% of TAPA members surveyed describe their theatre venues as only “somewhat suitable” for their productions, while 30% describe the venues as “very suitable”. Approximately one-tenth (9%) report that the theatre venues they use are either “somewhat unsuitable” (8%) or “very unsuitable” (1%).

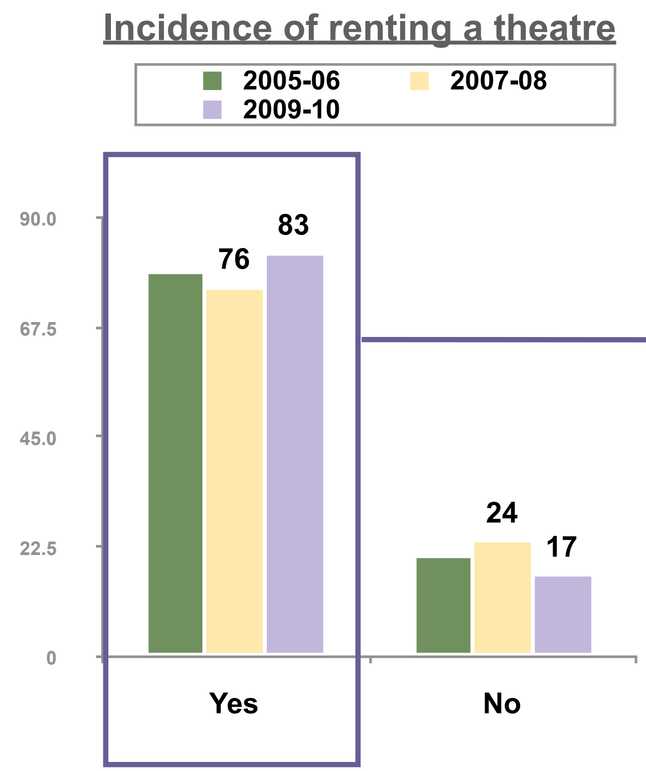
TAPA Member Theatre Venues



Median seating capacity of venues operated by TAPA Members
266
Total Number of Seats in 34 TAPA Venues
24,576

Q.1 Does your organization operate a theatre?
Base: Total respondents (n=80)
Q.2 How many theatres does your organization currently operate?
Base: Those organizations who operate a theatre (n=21)
Q.3 Please indicate the capacity for the theatre or theatres your organization currently operates.
Base: Those organizations who operate a theatre (n=21)

TAPA Member Theatre Venues – Rented



Median capacity of rented theatre venues
171

Q.4 Has your organization rented theatres in the past to host productions?
Base: Total respondents (n=80).
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=66)

Suitability of Theatre Venues

Overall, how suitable or unsuitable is the theatre you typically use for your productions?	Total Sample Phase II	Total Sample Phase III
n=	92	80
	%	%
Very suitable	38	30
Somewhat suitable	55	61
Somewhat unsuitable	4	8
Very unsuitable	3	1

What is the main reason this theatre is unsuitable for your productions?	Those who said venue is unsuitable
n=	7c
	%
Repairs/Renovations	14
Other Reason	86

	Other
n=	6c
	%
Expensive/too much rent	67
Sub-par facilities	33

Q.6 Overall, how suitable or unsuitable is the theatre you typically use for your productions?
Base: Total respondents (n=80)
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=7)
C: Caution Small Base Size

Productions and Performances

- The membership's responses indicate that the number of TAPA productions is increasing.
  - In 2009/10, the percentage who staged three to five productions increased from 2008/09 (23% in 2009/10 versus 16% in 2008/09).
  - In both 2008/09 (26%) and 2009/10 (24%), roughly one-quarter indicate that they staged 6 or more productions.
  - Consistent with previous years, roughly half of TAPA members indicate that they produced two or less productions in 2008/09 (55%) and 2009/10 (51%).
- As in previous years, there is considerable variation among the TAPA membership with respect to the number of productions presented. This is due to variations in: the number of TAPA members from year-to-year, the size of the companies within the membership from year-to-year, the nature of the development and creation process of new work in a given company, as well as variances in funding support.

theatre dance opera toronto alliance for the performing arts

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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**			

	2008/09				2009/10			
	TOTAL	Theatre	Dance	Other	**TOTAL**	Theatre	Dance	Other
n=	**80**	62	7c	10c	**80**	62	7c	10c
	%	%	%	%	**%**	%	%	%
2 or Less	**55**	61	14	52	**51**	57	14	45
3 to 5	**19**	15	43	31	**24**	20	43	38
6 to10	**11**	10	29	-	**11**	10	29	-
More than 10	**15**	15	14	17	**13**	13	14	17
Median Number of Productions	**2**				**2**			

Q.12 In the space provided below please indicate the number of productions your organization has presented in the each of the following theatre seasons

In-School Performances and Productions (TYA-Mandated Companies)

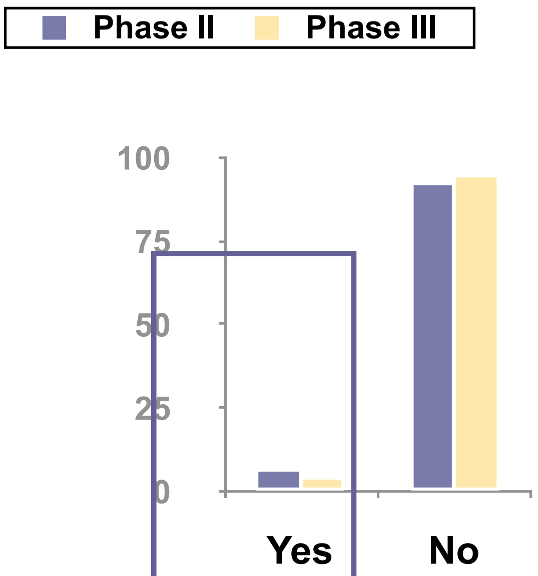
- While TYA-mandated organizations comprise a very small percentage of TAPA member organizations surveyed, they managed to reach nearly 90,000 students in 2009/10.
  - Consistent with the previous phase, only 5% of TAPA member organizations surveyed indicate that they are TYA mandated.
  - A total of 86,500 students attended in-school performances in each of the 2008/09 and 2009/10 theatre seasons.
  - 2,500 students attended non-school/non-theatre performances in each of the 2008/09 and 2009/10 theatre seasons.
- Among TYA-mandated companies, three companies put on performances in schools, three companies put on performances in theatres and one company produced performances in non-school/non-theatre venues (such as community centres).

In-School Performances and Productions (TYA-Mandated Companies) (cont'd)

- Most of the in-school venues were located in one of Toronto's 13 priority neighbourhoods, prioritized for addressing at-risk youth.
  - Two-thirds of the TYA-mandated companies who performed in schools report that more than 50% of their in-school venues were located in one of these neighbourhoods.
- As with previous phases, there is no single, dominant source of funding for in-school and non-school/non-theatre performances. Companies received funding from students, schools and other revenue sources.

TYA-Mandated Companies

Incidence of TYA-mandated companies



Those who are a TYA-mandated company and perform in …

Do you perform in…?	TYA-mandated companies Phase II	TYA-mandated companies Phase III
	#	#
Schools	4	3
Theatres	6	3
Non-School/Non-Theatre venues, i.e., community centres, libraries	3	1

Q.9 Are you a TYA-mandated company?
Base: Total respondents (n=80)
Q.10 Do you perform in…?
Base: Self-identified TYA-mandated companies (n=4)

Total number of students who attended school and non-school/ non-theatre performances of TYA-mandated companies

	2006/07		2007/08		2008/09		2009/10	
	Schools	Non-School/ Non-Theatre	Schools	Non-School/ Non-Theatre	Schools	Non-School/ Non-Theatre	Schools	Non-School/ Non-Theatre
	#	#	#	#	#	#	#	#
Total number of students who attended performances	**83,500**	**7,110**	**90,750**	**7,300**	**86,500**	**2,500**	**86,500**	**2,500**

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=4)

Percentage of in-school and non-school/non-theatre venues located in priority neighbourhoods for addressing at-risk youth – TYA-mandated companies

	2006/07	2007/08	2008/09	2090/10
	#	#	#	#
< 50 Percent	1	1	1	1
50 Percent to 80 Percent	2	2	2	2
Greater than 81 Percent	1	1	0	0

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=3)

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

Paid By	Schools		Non-School/Non-Theatre	
	Phase II	Phase III	Phase II	Phase III
	#	#	#	#
Student	1	2	0	1
School	1	3	1	2
Grants	1	0	2	0
Other	1	2	0	1

Q.26 How are your performances in schools and non-school/non-theatre venues usually paid for?
Base: Self-identified TYA-Mandated Companies (n=4)

Festival Performances

- Consistent with previous years, roughly one-quarter of TAPA members surveyed mounted festival performances.
  - Roughly one-quarter of TAPA organizations report performing in a festival in 2008/09 (24%) and 2009/10 (24%). This constitutes a minor reduction, compared to the 2006/07 (29%) and 2007/08 (32%) theatre seasons.
- Among those TAPA members who performed in festivals in either year, more than one-third (36%) consider festivals part of their regularly-scheduled season. This is down slightly from 43% in 2007/08.
  - This reduction appears to be the consequence of a reduction in the percentage of companies who specialize in dance (40% to 25%) or "other" types of performances (43% to 0%).
  - There has been no change in the percentage of companies who specialize in theatre and who report that festivals are part of their regularly-scheduled season (from 44% in 2007/08 to 44% in 2009/10).

Festival Performances

Did your company perform in a Festival in Toronto?	**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

Did your company perform in a Festival in Toronto?	**2008/09**				**2009/10**			
	TOTAL	Theatre	Dance	Other	**TOTAL**	Theatre	Dance	Other
n=	**80**	67	7c	6c	**80**	67	7c	6c
	%	%	%	%	**%**	%	%	%
Yes	**24**	21	57	33	**24**	20	57	33
No	**76**	79	43	67	**76**	80	43	67

Are Festivals part of your regularly scheduled season?	**2007/08**				**2009/10**			
	TOTAL	Theatre	Dance	Other	**TOTAL**	Theatre	Dance	Other
n=	**35**	23	5	7	**25**	18	4c	2c
	%	%	%	%	**%**	%	%	%
Yes	**43**	44	40	43	36	44	25	-
No	**49**	52	40	43	56	56	50	50
We Are a Festival	**9**	4	20	14	8	-	25	50

Q.11 Did your company perform in any festivals in the City of Toronto in the last two seasons?
Base: Total respondents (n=80)
Q.25 Are festivals part of your regularly scheduled season?
Base: Those who said that they perform in festivals for EITHER 2008/09 or 2009/10 or both at Q11 (n=25) **C: Caution Small Base Size

Audience Members

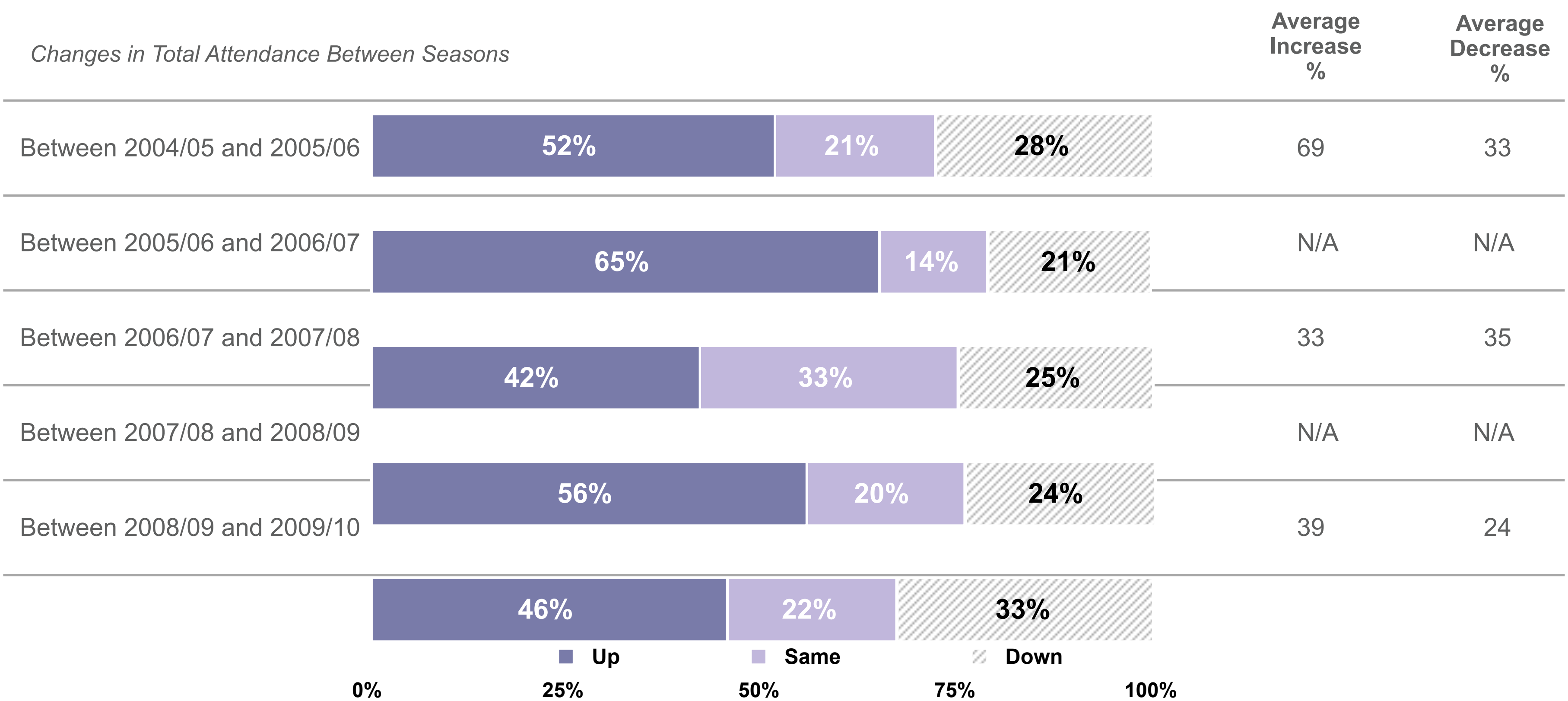
- Audiences appear to be attending in greater numbers.
  - 68% of TAPA members surveyed report that total audience attendance has increased or stayed the same between 2008/09 and 2009/10. By comparison, only one-third (33%) report that it decreased.
  - Compared to 2007/08, TAPA members are reporting greater audience attendance. Among TAPA members who report an increase in audience attendance, the average increase has gone from 33% between 2006/07 and 2007/08 to 39% between 2008/09 and 2009/10.
  - TAPA members are also reporting smaller decreases in audience attendance compared to 2007/08. For those companies who report a decrease in attendance, the average reported decrease is 24% between 2008/09 and 2009/10, down from 35% between 2006/07 and 2007/08.

Audience Members (cont'd)

- TAPA members are attracting audiences who reside outside of the City of Toronto in greater numbers, compared to previous years.
  - The percentage who report that more than 10% of their audience resides outside of Toronto has increased significantly from 60% in 2007/08 to 69% in 2009/10.
  - In 2009/10, 27% of TAPA audiences hailed from outside of the City of Toronto. This is up from 22% in 2005/06 and 2007/08.
- Consistent with previous years, TAPA members report that, on average, 3% of their audiences reside outside of Canada.

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

Comparison of Total Attendance in 2004/05, 2005/06, 2006/07, 2007/08, 2009/10



Q.20 Compared to the 2007/08 season, was your total attendance up, down or the same for the 2008-2009 season?
Q.21 Compared to the 2008-9 season, was your total attendance up, down or the same for the 2009-10 season?
Q.22 By what percentage is your attendance [insert response to Q.21] for the 2009-2010 season?
Base: Total respondents (n=80)

Location of Audience Members

	Location of Audience Members					
	Outside City of Toronto 2005-06	Outside City of Toronto 2007-08	Outside City of Toronto 2009/10	Outside Canada 2005-06	Outside Canada 2007-08	Outside Canada 2009/10
n=	39	40	42	34	35	80
	%	%	%	%	%	%
10 percent or less	44	40	31	94	94	97
11 percent to 25 percent	28	30	31	3	-	-
26 percent to 50 percent	15	20	21	3	3	3
More than 50 percent	13	10	17	-	3	-
DK/NA	55	57	48	61	62	53

	Average 2005-06	Average 2007-08	Average 2009-10
	%	%	%
Outside City of Toronto	22	22	27
Outside Canada	4	4	3

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 (n=80)
Note: Percentages exclude "don't know" responses.

Single Tickets and Subscriptions

- As with previous phases, nearly three-quarters (71%) of TAPA members sell single tickets only, while the remainder (29%) sell a combination of single tickets and subscriptions.
- In each of the past six seasons, TAPA members surveyed have sold more than two million single tickets. Single ticket sales increased slightly from 2,338,335 in 2007/08 to 2,399,687 in 2008/09. However, single ticket sales dropped to 2,228,719 in the 2009/10 season. This, however, does not constitute a year-over-year decline. Since 2004/05, single ticket sales have fluctuated within a consistent range, falling between approximately 2 million and 2.4 million single tickets sold.
- The average number of single tickets sold was 29,996 in the 2008/09 season and 27,859 in the 2009/10 season. The median number of single tickets sold was 1,375 in the 2008/09 season and 1,174 in the 2009/10 season.
- Continuing a year-over-year trend, 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 132,266 in 2008/09 and 132,455 in 2009/10. This constitutes a 56% increase between 2004/05 and 2009/10.

Single Tickets and Subscriptions

	Total Phase I	Total Sample Phase II	Total Sample Phase III
n=	86	81	80
	%	%	%
Single Tickets only	74	72	71
Single Tickets and Subscriptions	26	28	29

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=80)

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

	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	Change Between 2008/09 and 2009/10	Change Between 2004/05 and 2007/08
n=	81	83	81	81	79	80	-	-
Number of Single Tickets Sold	2,276,526	2,490,208	2,075,624	2,338,335	2,399,687	2,228,719	-170,968	-47,807
Average Number of Single Tickets Sold	28,105	30,003	25,625	28,868	29,996	27,859	-2,137	-246
Median Number of Tickets Sold	1,200	1,500	1,440	1,800	1,375	1,174	-201	-26

	Number of paid subscribers
	#
2004/05	84,673
2005/06	85,626
2006/07	91,462
2007/08	97,354
2008/09	132,266
2009/10	132,455
Difference Between 2008/09 and 2009/10	189
Difference Between 2009/10 and 2004/05	47,782

Q.16 How many (non-festival/non-in-school) paid single tickets were sold by your organization in both the 2007-2008 and 2008-2009 seasons?
Base: Those organizations that report selling single tickets @Q15 (n=80)
** Note: Phase II and Phase III asked about non-festival/non-in-school single tickets. Phase I 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=24)

Revenue Sources for TAPA Member Organizations

- TAPA members have a number of revenue streams, including, but not limited to, ticket sales, fundraising, government grants and endowments.
- TAPA members reported that their total revenue in 2008/09 was $230,082,022 – the highest revenue levels reported since the 2004/05 season. In 2009/10 this figure dropped slightly to $216,233,513 (including rental income requested for the first time in Phase III).
- Ticket sales continue to decline as a percentage of revenue. In 2004/05, single tickets and subscriptions accounted for 77% of total revenues. In 2009/10, ticket sales accounted for 65% of total revenues.
- As a percentage of total revenues, fundraising remains a stable source of revenue. In 2009/10, fundraising remains stable at 19%, after rising from 11% to 17% between 2004/05 and 2007/08. However, in real dollar terms, fundraising has increased significantly over the same period, from $21,254,903 in 2004/05 to $38,298,380 in 2009/10.
- Government grants are taking on an increasingly important role as a source of revenue. In 2009/10, government grants constitute 17% of the revenue for TAPA members, whereas in 2004/05, they comprised only 12%. In real dollar terms, this constitutes an increase from $24,127,045 in 2004/05 to $35,483,590 in 2009/10.
- Rental income (measured for the first time in Phase III) constitutes 6% of revenue in 2009/10.

Revenue Sources for TAPA Member Organizations (cont'd)

- While government grants are continuing to rise on an overall basis, there is evidence that the growth rate in government grants is slowing down.
  - Overall, government grants continue to be on the rise. Four-in-ten (41%) TAPA members indicate that government grants have increased since 2008/09, while only 17% report that they have decreased.
  - The growth rate, however, is slowing down. Four-in-ten (43%) TAPA members report that government grants have stayed the same as 2008/09, compared to 21% who report that they stayed the same between 2006/07 and 2007/08.
- Corporate donations, special event revenues and individual donations also appear to be on the rise.
  - One-third of TAPA members surveyed (32%) indicate that corporate donations rose in Phase III, compared to only two-tenths (18%) who indicate that corporate donations declined during this period.
  - Likewise, one-third (32%) indicate that special event revenues increased in Phase III, compared to two-in-ten (17%) who report that special event revenues declined during this period.
  - Four-in-ten (44%) report that individual donations rose in Phase III, compared to one-quarter (27%) who report that individual donations declined during this period.

* 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 (cont'd)

	2004/05		2005/06		2006/07		2007/08		2008/09		2009/10	
	TOTAL		TOTAL		TOTAL		TOTAL		TOTAL		TOTAL	
	$	% of Total	$	% of Total	$	% of Total	$	% of Total	$	% of Total – Rental Income Removed	$	% of Total – Rental Income Removed
Grand Total	**194,170,749**	**100**	**218,926,160**	**100**	**201,986,211**	**100**	**212,744,001**	**100**	214,418,388	**100**	203,950,814	**100**
Ticket Sales	**148,788,801**	**77**	**169,318,149**	**77**	**146,566,475**	**72**	**152,314,318**	**72**	145,498,055	**68**	132,079,844	**65**
Single Ticket Sales	125,617,009	84	141,266,930	83	108,557,784	74	108,133,613	71	**112,016,418**	77	100,554,161	76
Subscription Sales	23,171,792	16	28,051,219	17	38,008,691	26	44,180,768	29	33,481,637	23	31,525,683	24
Fundraising	**21,254,903**	**11**	**23,650,547**	**11**	**34,108,042**	**17**	**36,072,874**	**17**	37,232,937	**17**	38,298,380	**19**
Individual Donations	9,940,238	47	11,310,593	48	16,240,279	48	15,422,140	43	14,619,971	39	16,067,920	42
Corporate Donations	1,883,950	9	1,227,339	5	1,824,150	5	1,404,508	4	3,952,324	11	4,095,645	11
Sponsorships	4,753,078	22	5,047,918	21	8,291,155	24	10,257,555	28	9,430,540	25	9,718,784	25
Foundations	1,988,800	9	2,223,795	9	3,463,263	10	4,661,183	13	5,522,063	15	3,667,653	10
Special Events	2,688,837	13	3,840,902	16	2,610,253	8	2,765,961	8	2,458,466	7	3,551,712	9
Endowments	n/a	n/a	n/a	n/a	1,678,942	5	1,561,527	4	1,249,573	3	1,196,666	3
Government Grants	**24,127,045**	**12**	**25,957,464**	**12**	**21,311,694**	**11**	**24,356,809**	**11**	33,799,396	**16**	35,483,590	**17**
City	4,418,848	18	4,734,078	18	4,453,191	21	6,178,425	25	7,241,693	21	6,899,487	19
Provincial	6,739,832	28	6,951,946	27	5,744,762	27	6,001,823	25	12,739,043	38	14,102,396	40
Federal	12,968,365	53	14,271,440	55	11,113,741	52	12,176,561	50	13,818,660	41	14,481,707	41

Q.29 In the spaces provided below, please list your total revenue from each of the following sources for both the 2008-2009 theatre season
Q.30 In the spaces provided below, please list your total revenue from each of the following sources for both the 2009-2010 theatre season
Base: Among those who reported their financial information. Base sizes vary.

Revenue Sources for TAPA Member Organizations (cont'd)

	2008/09		2009/10	
	TOTAL		TOTAL	
	$ Including Rental Income	% of Total Including Rental Income	$	% of Total Including Rental Income
Grand Total	230,082,022	**100**	216,233,513	**100**
Ticket Sales	145,498,055	**63**	132,079,844	**61**
Single Ticket Sales	**112,016,418**	77	100,554,161	76
Subscription Sales	33,481,637	23	31,525,683	24
Fundraising	37,232,937	**16**	38,298,380	**18**
Individual Donations	14,619,971	39	16,067,920	42
Corporate Donations	3,952,324	11	4,095,645	11
Sponsorships	9,430,540	25	9,718,784	25
Foundations	5,522,063	15	3,667,653	10
Special Events	2,458,466	7	3,551,712	9
Endowments	1,249,573	3	1,196,666	3
Government Grants	33,799,396	**15**	35,483,590	**16**
City	7,241,693	21	6,899,487	19
Provincial	12,739,043	38	14,102,396	40
Federal	13,818,660	41	14,481,707	41
**Rental Income	15,663,634	7	12,282,699	6

Q.30 In the spaces provided below, please list your total revenue from each of the following sources for both the 2009-2010 theatre season.
Base: Among those who reported their financial information. Base sizes vary.
** Rental Income asked or the first time in Phase III

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

	Change in 2007/08 Compared to 2006/07	Change in 2009/10 Compared to 2008/09	Average Increase or Decrease between 2006/07 and 2007/08 (%)	Average Increase or Decrease between 2008/09 and 2009/10 (%)
	%	%	%	%
Corporate Donations				
Increase	22	32	144	66
Remained the Same	55	51	N/A	N/A
Decrease	22	18	43	44
Foundation Grants				
Increase	29	23	97	72
Remained the Same	54	53	N/A	N/A
Decrease	16	24	39	52
Government Grants				
Increase	34	41	75	45
Remained the Same	21	43	N/A	N/A
Decrease	46	17	31	41
Individual Donations				
Increase	34	44	74	57
Remained the Same	25	29	N/A	N/A
Decrease	41	27	35	70
Special Events				
Increase	24	32	124	113
Remained the Same	16	52	N/A	N/A
Decrease	60	17	36	38
Endowments				
Increase	5	10	157	69
Remained the Same	20	79	N/A	N/A
Decrease	74	11	39	47

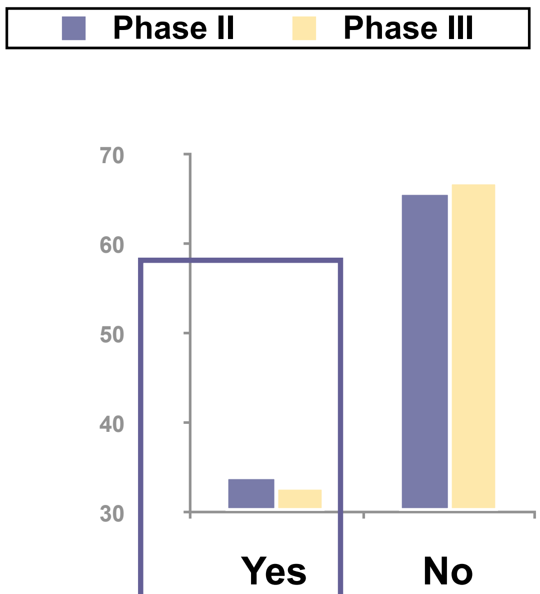
Q.31 For each of the following, please indicate if the contributions are up, down or the same for the 2009-2010 theatre season, compared to the 2008-2009 season.
Base: Total respondents (n=80)

TAPA Member Advertising

- TAPA members advertise in a wide number of locations throughout the world.
  - Consistent with the previous phase, one-third (33%) advertise to potential audiences outside of the GTA.
  - Among those who advertise outside of the GTA, 54% advertise in Ontario outside of the GTA, 38% advertise in the United States, 4% advertise in Canada outside of Ontario and 8% advertise internationally, excluding the United States.
- While substantial percentages continue to advertise through traditional media, such as post cards (87%) and newspapers (74%), an increasingly large percentage is using web media (95%), up from 85% in the previous phase.
- There has also been a significant increase in the use of cross-promotions with other arts organizations (from 80% in the previous phase to 86% in 2009/10).
- Half of TAPA members surveyed continue to advertise on radio (51%) and in magazines (51%).
- NOW Magazine continues to be the most widely used newspaper for TAPA member advertising (81%) where, on average, TAPA members spend nearly two-thirds (60%) of their paid newspaper advertising budgets with NOW Magazine. NOW Magazine continues to be followed by The Toronto Star (48%) and The Globe and Mail (36%) as having the largest share of TAPA members' print media budgets.

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

Market outside of the GTA



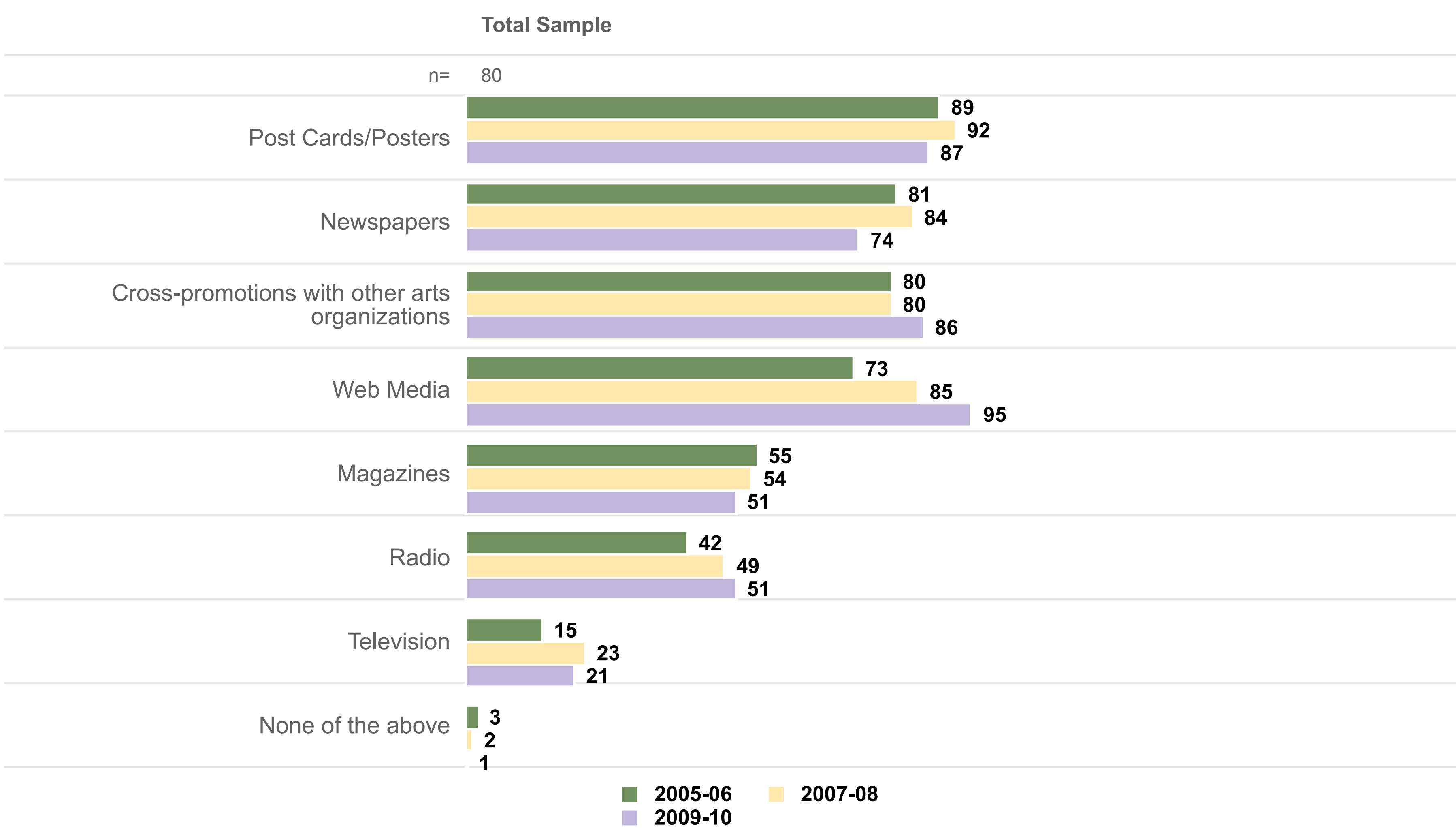
Market Areas

	Marketing locations outside of Toronto* (Phase II)	Marketing locations outside of Toronto* (Phase III)
n=	31	26
	%	%
GTA	39	19
Ontario Outside of the GTA	39	54
Canada outside of Ontario	13	4
Canada (General)	10	23
United States	20	38
International (outside of US)	10	8
Other/Not Specified	16	4

** Multiple Mentions Accepted*

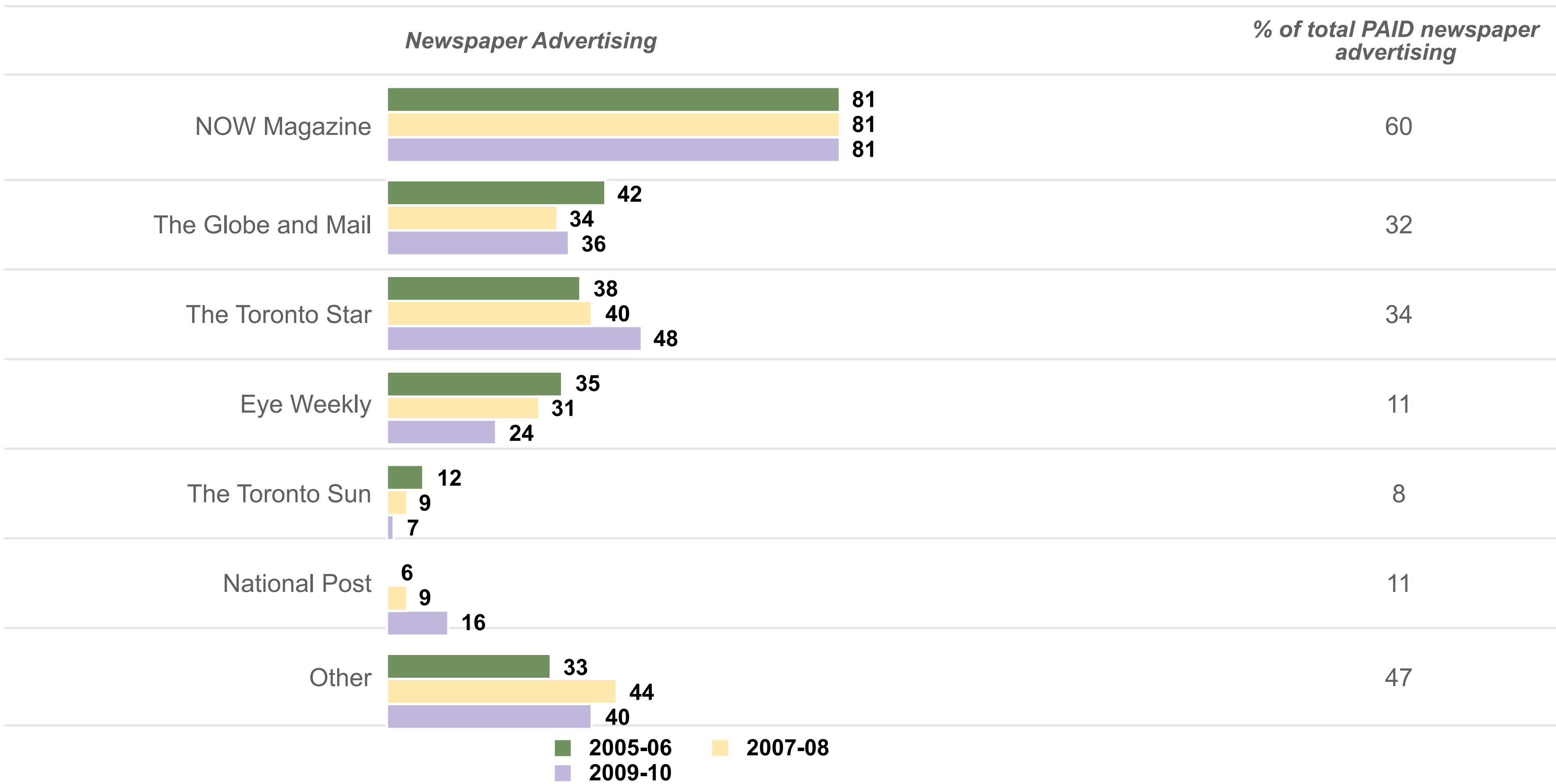
Q.41 Do you do any marketing outside of the GTA?
Base: Total respondents (n=80)
Q.42 If so, where?
Base: Respondents who do marketing outside of the GTA (n=26)

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 (n=80)

TAPA Member Newspaper Advertising



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=58)
Note: Multiple mentions accepted

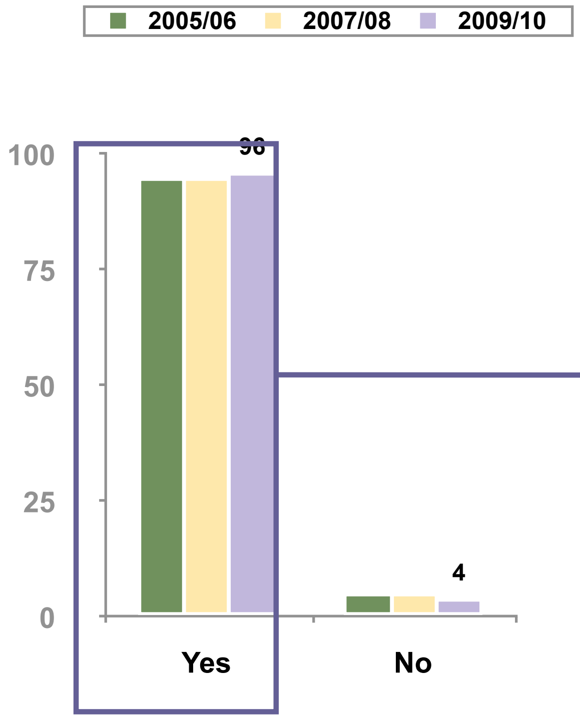
TAPA Member Website Usage, Web Media and Social Media

- TAPA member website usage has remained consistent since tracking began in the 2005/06 theatre season.
  - Consistent with previous phases, virtually all (96%) of TAPA member organizations have their own website.
- As with previous years, it is not entirely clear how much traffic is visiting these websites.
  - Nearly two-thirds (63%) of TAPA members with websites report that they do not know how many hits their website receives per week.
  - When asked how many unique hits their websites receive, two-thirds (67%) report that they do not know.
- However, there is evidence to suggest that TAPA member organizations are increasingly able to track the number of hits their websites receive.
  - The percentage who report that they don't know how many unique hits their websites receive per week has gone down from 79% in 2007/08 to 67% in 2009/10.
  - The percentage who report that they don't know how many hits their websites receive per week has gone down slightly from 68% in 200708 to 63% in 2009/10.
- Among TAPA members with websites, 3% report receiving more than 50,000 website hits per week, 9% report receiving 5,001 to 50,000 hits per week and one-quarter (25%) report receiving less than 5,000 hits per week.

TAPA Member Website Usage, Web Media and Social Media (cont'd)

- Increasingly, TAPA members are leveraging their websites in order to sell tickets to performances.
  - The ability to sell tickets has consistently gone up. In 2009/10, more than half (57%) say that they have the ability to sell tickets online. By comparison, only one-third (37%) were able to do so in 2007/08, while only one-quarter (26%) were able to sell tickets online in 2005/06.
  - Consistent with previous years, seven-in-ten (70%) of those able to sell tickets online can sell tickets in real time directly from their inventory.
- TAPA members are making extensive use of new media and social media to promote and attract business.
  - Consistent with Phase II, nearly all TAPA members surveyed (91%) use social networking media to promote and attract business.
- The percentage of TAPA member budgets that are allocated to new media has increased since Phase II.
  - In Phase III, seven-in-ten (70%) indicate that they allocated between 1% and 40% of their marketing budgets to new media, compared to 64% in Phase II.
  - Nearly half (41%) allocate between 11% and 40% of their marketing budgets to new media, compared to only one-quarter (29%) in Phase II.

Website Use Among TAPA Members

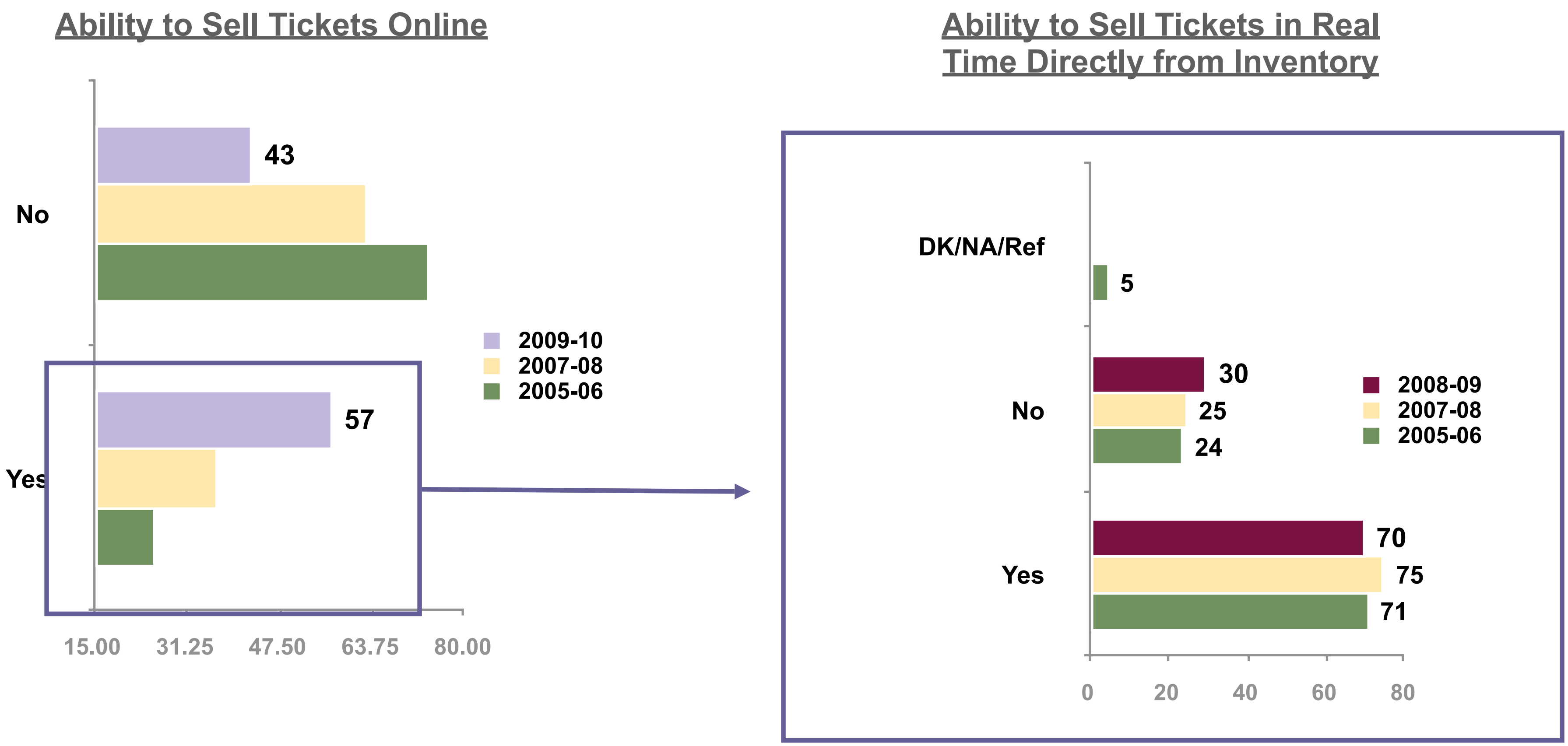


Hits and Unique Visitors per week

	Website hits per week 2005-06	Website hits per week 2007-08	Website hits per week 2009-10	Unique hits per week 2005-06	Unique hits per week 2007-08	Unique hits per week 2009-10
	%	%	%	%	%	%
5,000 or Less	20	22	25	15	17	26
5,001 to 50,000	5	5	9	5	3	6
More than 50,000	7	6	3	1	0	1
DK/NA	68	68	63	79	79	67

Q.45 Does your organization have its own website?
Base: Total respondents (n=80)
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=77)

Website Use for Selling Tickets Among TAPA Members



Q.48 Do you sell single tickets or subscriptions for your productions on your website?
Base: Those organizations that have a website (n=75)
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=43)

Use of New Media and Social Networking Media Among TAPA Members

	Percentage of Marketing Budget allocated to new media	
	Phase II	**Phase III**
	%	%
0 percent	11	13
1 to 10 percent	35	29
11 to 20 percent	20	23
21 to 40 percent	9	18
41 to 60 percent	5	6
More than 60 percent	5	5
DK/NA	15	8

	Use of social networking media to promote/attract business	
	Phase II	Phase III
	%	%
Yes	92	91
No	8	9

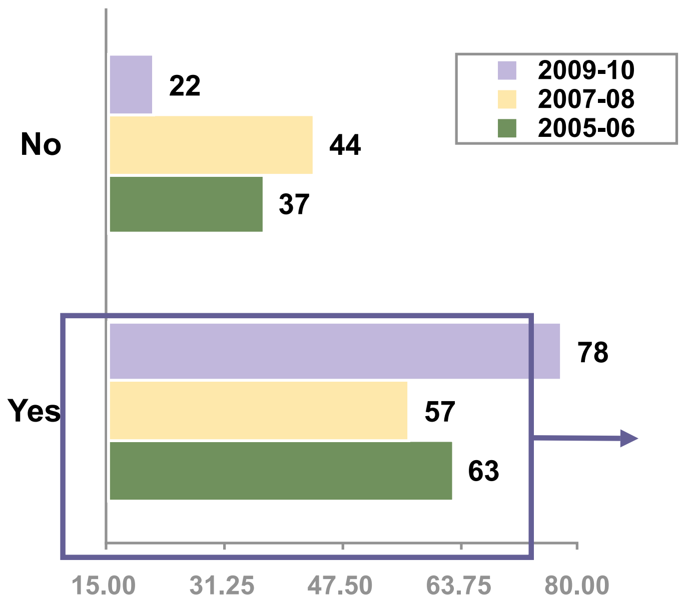
Q.43 What percentage if any of your total marketing budget is allocated to new media such as e-marketing, podcasts, blogs banner ads, etc.?
Base: Total respondents (n=80)
Q.44 Does your organization use social networking media such as Facebook or MySpace to promote/attract business?
Base: Total respondents (n=80)

Partnerships and Cross-Promotions

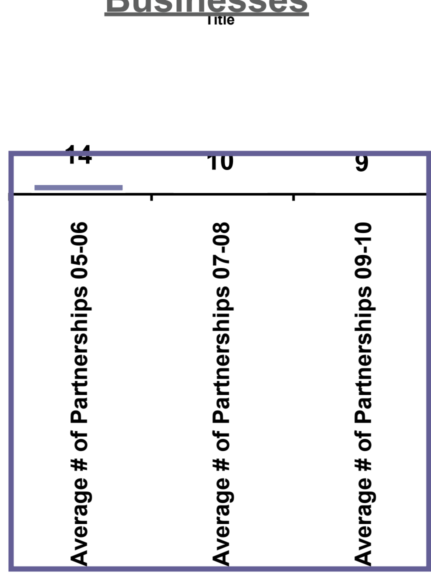
- Compared to previous phases of research, a greater number of TAPA members are more actively engaging in partnerships and cross-promotions with local businesses.
  - More than three-quarters of TAPA members (78%) participate in cross-promotions with local businesses. This constitutes an increase over 2007/08 (57%) and 2005/06 (63%).
- On average, TAPA members participate in nine different partnerships and cross-promotions. The most common type of partnership is with other theatres (74%), restaurants (56%), and other live venues (43%).
- However, compared to previous years, TAPA members appear to be engaged in fewer cross-promotions. The average number of cross-promotions has dropped from 14 cross-promotions to 9 cross-promotions between 2005/06 and 2008/09 This is likely a result of an increase in companies who are new to cross-promotions, and who as a result engage in fewer compared to those companies who have a history with cross-promotions.
- Cross-promotions tend to be more focused on building relationships with other performing arts organizations, compared to 2007/08.
  - The percentage of cross-promotions that occur with other theatres is up from 56% in 2007/08 to 74% in 2009/10.
  - Additionally, the percentage of cross-promotions with other live performance venues is up from 33% in 2007/08 to 43% in 2009/10.
  - Other cross-promotions are down between 2007/08 and 2009/10 – restaurants (67% to 56%), local charities (31% to 23%), Tourism Toronto (31% to 20%) and museums (25% to 18%).

Partnerships and Cross-Promotions

Participates in Partnerships or Cross-promotions with Local Businesses



Number of Existing Partnerships or Cross-promotions with Local Businesses



Types of Businesses with Current Partnerships or Cross-promotions

Partnership or Cross-Promotion with…	05-06	07-08	09-10
n=	54	52	61
	%	%	%
Other theatres	69	56	74
Restaurant	52	67	56
Other live performance venue	39	33	43
Local charity	33	31	23
Tourism Toronto	25	31	20
Museum	13	25	18
Parking lot	4	6	5
Other	50	39	74

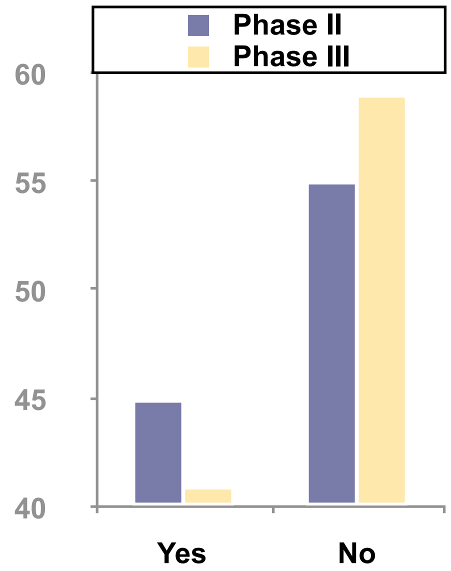
"Other" includes, but is not limited to, education, institutions, hotels, BIAs and a wide variety of other business.

Q.50 Does your organization participate in any partnerships or cross-promotions with other local businesses?
Base: Total respondents (n=80)
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=61)

High School Performances

- Compared to previous years, more young people are participating in cultural experiences provided by TAPA members.
  - Consistent with previous phases, more than four-in-ten (41%) TAPA members provide designated high school performances.
- There has been a steady, year-over-year increase in the number of high school groups attending TAPA members' performances.
  - The number of high school groups attending performances has more than tripled between 2004/05 and 2009/10 from 2,469 groups to 8,798 groups.
  - The average number of high school groups has expanded considerably, from 29 groups in 2004/05 to 274 groups in 2009/10.
  - The percentage of TAPA members who indicate that fewer than five high school groups attend their performances has dropped from 64% in 2007/08 to 50% in 2009/10.

High School Performances



Number of high school groups who attended a performance					
2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
2,469	2,808	3,787	5,039	6,355	8,798
Average number of high school groups who attended a performance					
29	33	41	55	53	54

Q.53 Do you have designated high school matinee performances?
Base: Total respondents (n=80)
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=80)

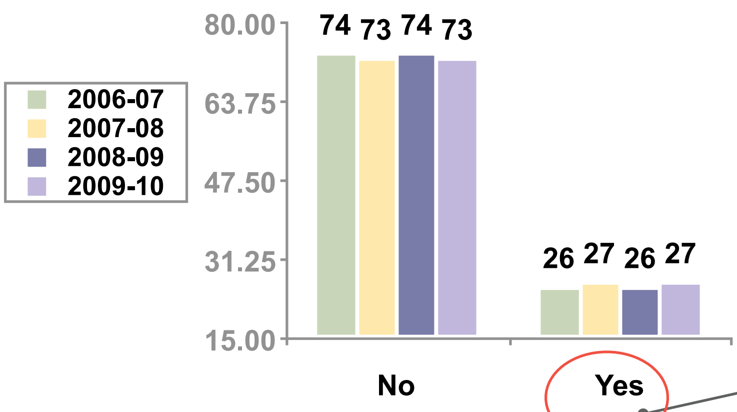
Touring

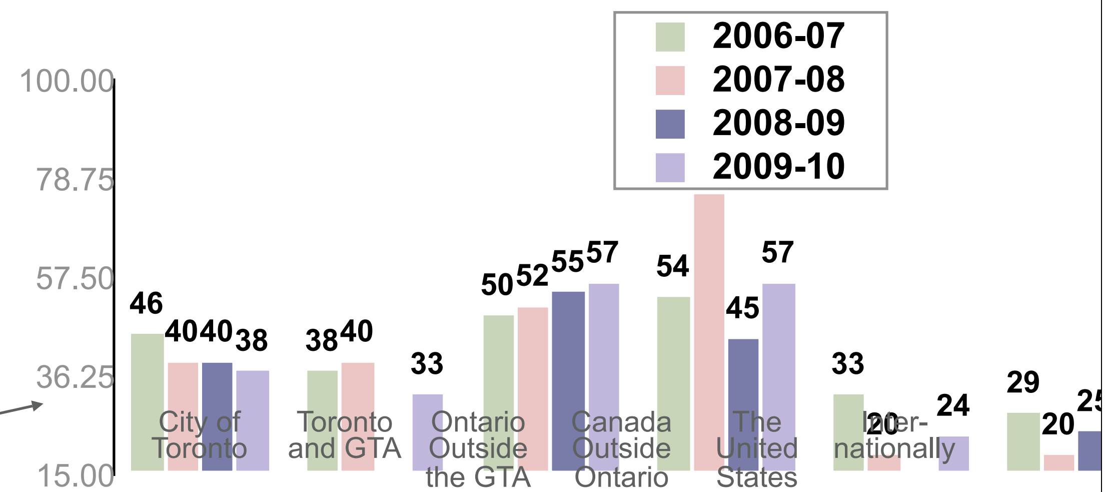
- Touring continues to be a significant focus for many TAPA members.
  - Consistent with previous phases, roughly one-quarter of TAPA members went on tour in 2008/09 (26%) and 2009/10 (27%).
  - In 2009/10, TAPA members produced a total of 85 tours, spanning 358 venues. On average, TAPA members who toured conducted four tours that reached 23 venues.
  - In 2008/09, TAPA members produced 86 tours, spanning 458 venues. On average, TAPA members who toured conducted four tours that reached 23 venues.
- The number of tours that TAPA members undertook has also gone up significantly, from 57 in 2006/07 to 85 in 2009/10.
- TAPA members tour throughout Canada, the United States and Internationally. However, between 2008/09 and 2009/10, the percentage who toured in Toronto and the GTA, Canada outside Ontario and the United States, increased substantially.
  - Those who toured were more likely to go to the United States (15% in 2008/09, up to 24% in 2009/10). They were also less likely to tour internationally outside of the US (25% in 2008/09, down to 19% in 2009/10).
  - Touring in Canada outside of Ontario rose from 45% of those who toured in 2008/09 to 57% in 2009/10.
  - Touring in Toronto and the GTA rose from 15% in 2008/09 to 33% in 2009/10.

Touring (cont'd)

- TAPA members are most likely to tour throughout Ontario and Canada.
  - More than half of those who toured in 2009/10 toured through Canada outside of Ontario (57%) and Ontario outside the GTA (57%).
  - Consistent with previous years, 38% toured through Toronto and the GTA.
- Compared to 2006/07, TAPA members reported that they drew more money for touring from ticket sales.
  - In 2008/09 (36%) and 2009/10 (35%), ticket sales constituted a greater percentage of revenue for touring, compared to 2006/07 (28%) and 2007/08 (17%).
  - In 2008/09, the Federal Government (20%) spiked as a source of funding for touring, compared to previous years (8% in 2006/07 and 12% in 2007/08). However, Federal Government funding for touring settled back down at 10% in 2009/10.

Touring





Number of Tours				Number of Venues performed in while on tour			
2006-07	2007-08	2008-09	2009-10	2006-07	2007-08	2008-09	2009-10
57	54	86	85	479	474	458	358
Average Number of Tours (among those who toured)				**Average # of Venues performed in while on tour**			
2006-07	2007-08	2008-09	2009-10	2006-07	2007-08	2008-09	2009-10
2	2	4	4	20	19	23	17

Q.33 Did your company tour in 2008-09 and 2009-10?
Base: Total respondents (n=80)
Q.34 Where did you tour?
Q.35 How many tours did you make in each year?
Q.36 In total, how many venues in each year did you perform while on tour?
Base: TAPA members who companies toured in 2007-08 (n=21) and 2008-09 (n=22)

Touring (cont'd)

What percentage of the total cost of touring came from the following sources?	2006-07	2007-08	2008-09	2009-10
n=	24	25	21	22
	Average %	Average %	Average %	Average %
Ticket Sales	28	17	36	35
Guaranteed Fees / Presenter Fees / Performance Fees	27	24	N/A	N/A
Federal Government	8	12	20	10
Provincial Government	11	10	8	8
City	2	3	2	1
Foundations	3	4	8	7
Fundraising	7	9	13	12
Other	51	46	47	49

Q.37 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=21)

Looking Forward

- TAPA members surveyed are largely optimistic about their future. However, the intensity of this optimism has declined somewhat.
  - Consistent with Phase II, more than three-quarters (78%) say that they are positive about the future. Only 1% say that their view of the future is negative.
  - The intensity of this optimism has declined somewhat. In 2009/10, roughly one-quarter (28%) report that they are “very positive” about the future, while in 2007/08 more than one-third (38%) reported that they were “very positive”.
- Ticket sales/filling the audience/declining tourism (47%) continues to be the number one challenge cited by TAPA members as they look into the future. Other challenges include receiving government funds/funding (39%), money/funds/finances/ budget (36%), staffing issues (27%), private fundraising (27%) and venue issues (30%).
- General mentions of the declining economy have dropped significantly as a challenge cited, as TAPA members surveyed look into the future (20% in Phase II to 6% in Phase III).

Looking Forward (cont'd)

How would you best describe the company's views about the future?	Total Sample Phase II	Total Sample Phase III
n=	92	80
	%	%
NET Positive	**78**	**78**
Very Positive	38	28
Somewhat Positive	40	50
Uncertain	19	21
Somewhat Negative	1	1
Very Negative	2	-
NET Negative	**3**	**1**

Q.54 Thinking ahead the next year or two, how would you best describe the company's view about the future?
Base: Total respondents (n=80)

Looking Forward (cont'd)

Top three challenges	Total Sample Phase II	Total Sample Phase III
n=	92	80
	%	%
Ticket Sales/Filling Audience/Declining Tourism	62	47
Money/funds/finances/budget/operating expenses (general)	45	36
Staffing Issues	37	27
Private Fundraising	36	27
Receiving Government Funds/Funding	34	39
Declining Economy (General)	20	6
Need new/better/larger venue/Venue issues	20	30
Marketing/Promotion	-	13
Creative issues/scripts/acts/programming	-	10
Other/DK/Ref	40	30

Q.55 What are the three biggest challenges the company faces over the next year or two?
Base: Total respondents (n=80)