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theatre dance opera toronto alliance for the performing arts

A REPORT TO TORONTO ALLIANCE FOR THE PERFORMING ARTS

MEMBERS SURVEY

January, 2017

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INTRODUCTION AND METHODOLOGY

Introduction

- *The Strategic Counsel* is pleased to present findings of a survey of 69 member organizations of the Toronto Alliance for the Performing Arts (TAPA). Results are based on an online survey sent to TAPA members conducted between August 26, 2016 and November 15, 2016.

- A total of 143 companies were invited to participate in the survey. In all, 92 respondents/members entered the survey (total interviews started) but only 69 completed the survey. The response rate is 49%. This is lower than the 2010 (phase 111) TAPA survey where 80 organizations completed the survey, for a response rate of 54%. (One reason for the lower response rate, and as noted in this report, may be the decline in staff at TAPA organizations and which may have made it more difficult to find the resources to complete the survey.)

- 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). Phase III summarized data representing the periods 2008/08 and 2009/10.

- This report summarizes data for Phase IV, collected for the periods of 2014/15 and 2015/16.

- The sample of survey respondents is comprised of a mix of not-for-profit and for-profit TAPA member organizations.

- 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.

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EXECUTIVE SUMMARY

Executive Summary

- TAPA members appear to be in an expansive phase of their collective development with increases among members of the number of production mounted in a season and fewer members giving less than 10 performances in a season.

- Nearly 2,350,000 single ticket were sold by TAPA members in the 2015/16 season. This is third highest amount recorded in the four waves of surveying going back to the 2004/05 season.

- In addition, 133,000 subscriptions were sold and this is relatively unchanged, since the large increase recorded back in the 2008/09 season.

- The City continues to be a draw for audiences from outside of Toronto and with 36% of members reporting that a quarter or more of their audience comes from outside the City. However, half of member companies continue to either not have data bases that allow them to make any estimates of the location of their audiences or have a large number of walk up ticket buyers.

- Despite the increasing number of productions, TAPA members appear to be doing more with fewer resources. The number of reported full and part-time artistic and non artistic staff continues to decline.

- Despite relative stability of ticket sales, revenues for 2014/15 and 2015/16 are considerably higher than the preceding years surveyed. For example, in 2015/16 TAPA members report their total revenue as being over $290 million. This is an increase of almost $75 million since the last survey period of 2009/10.

- The increase is almost entirely due to revenue from single ticket sales, but not subscriptions. This suggests that the increase is a result of increases in ticket prices, since the number of ticket sold is relatively stable.

Executive Summary

- Further, a closer examination of other revenue sources shows that revenue from government grants is relatively unchanged as is fundraising revenue.   However, there are shifts within the various forms of fundraising. The largest single source of fundraising continues to be individual donations, including special events, with donations from corporations, including sponsorships, showing a significant decline from 2009/10 and is well below the amounts raised from the public. Moreover, there has been a significant decline in revenue from sponsorships that has not been offset by an increase in corporate donations.

- TAPA members continue to use a variety of channels to publicize their performances.   But there has been a substantial decline in the reported use of newspapers and magazines.   However, posters and postcards continue to be heavily used as well as digital media. Almost all TAPA members report Facebook and Twitter usage and to a lesser extent Instagram.

- Just as they use a variety of channels, budget is also widely distributed across these channels, with post cards and posters and other non brochure print material, taking the largest share of the budget, followed by newspapers , online and social media.

- Interestingly, assessments of the value for money of the various channels used varies greatly, with social media, their website and brochures providing the highest value for money and newspapers/magazines the lowest.

- TAPA members report a substantial increase in the last two seasons in the proportion touring relative to earlier waves of this survey.   Touring is taking place within and often outside Ontario and with over a quarter involving international tours.

- Finally members appear to be highly optimistic about the next two to three years with 75% saying they have a positive outlook regarding the future for their company and 45% saying they are very positive.

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DETAILED FINDINGS

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PERFORMANCE FOCUS OF MEMBER COMPANIES

Performance Focus and Member Companies

- Theatre is by far the most popular type of performance, with roughly three-quarters of companies putting on theatre productions in 2015/16.
- Dance performances are the second most popular type of performance, with roughly one-in-five member companies putting on dance productions in 2015/16.
- These figures are consistent with the type of performance which member companies feel is their primary focus.

Types of Performances Produced by TAPA Members

	Total Sample Phase I	Total Sample Phase II	Total Sample Phase III	Total Sample Phase IV
n=	86	92	80	69
	%	%	%	%
Theatre	72	75	78	81
Dance	22	20	19	19
Opera	6	5	8	7
Other	21	16	14	7

Q.A Which of the following types of live performance did your company produce in 2014-15 and/or 2015-16?
Base: Total respondents (n=69)
Note: Multiple mentions accepted

Primary Performance Focus of TAPA Members

	Total Sample Phase I	Total Sample Phase II	Total Sample Phase III	Total Sample Phase IV
n=	86	92	80	69
	%	%	%	%
Theatre	70	71	78	77
Dance	14	12	9	12
Opera	3	3	5	4
Other	13	14	8	7

Q.B Which type of live performance is the primary focus of your organization?
Base: Total respondents (n=69)

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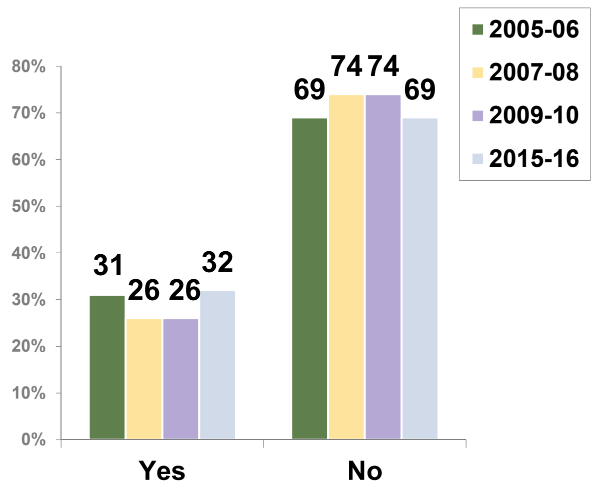
ABOUT VENUES

About Venues

- Roughly a third (32%) of members operate their own venue, up from 26% in 2009/10 and level with the proportion reported in the benchmark survey (2005/06).
- Just under half (46%) operate a single venue, while a little more than a third (36%) operate two.
- All of the members who operate a venue (or several) have at one time or another rented it (or them) to another organization of individual.
- Roughly eight-in-ten (82%) have rented their venue(s) for use as a rehearsal space or for mounting a production.
- The incidence of renting a theatre venue for the purposes of hosting a production is 84% among member companies, level with results from previous wave.
- The median capacity of rented theatre venues in 2015/16 stands at 150.
- The share of member companies who deem their theatre venues ‘very suitable’ for hosting productions ranges widely across the sample phases, from a low of 30% in the Phase III sample, to a high of 52% in the Phase IV sample.
- Among those who deemed their venues less than suitable (‘somewhat suitable’) for hosting productions – which, it is important to note, represent only 5% of the total - the most popular reason given was a need for repairs 20%).

TAPA Member Theatre Venues: Proportion with own Venue

Incidence of operating a theatre



Median seating capacity of venues operated by TAPA Members
270
Total Number of Seats in 22 TAPA Venues
33783

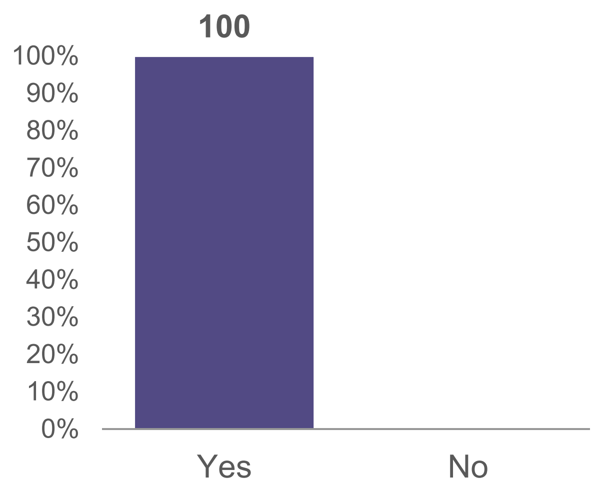
Number of Venues Organization Operates

Yes at Q1	Total
	n=22
	%
1	46
2	36
3	9
4 or more	9

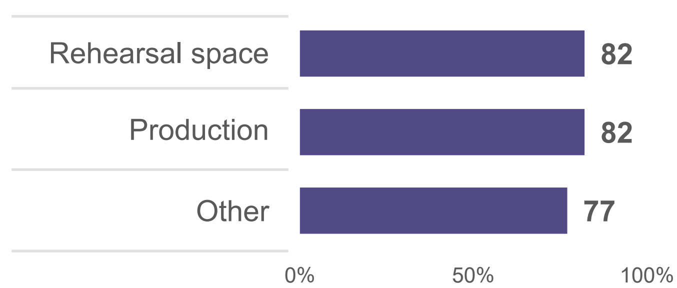
Q.1 Does your organization operate a venue?
Base: Total respondents (n=69)
Q.2 How many venues does your organization currently operate?
Base: Those organizations who operate a theatre (n=22)
Q.3 Please indicate the capacity for the venue or venues your organization currently operates.
Base: Those organizations who operate a theatre (n=22)

Among those with Own Venue: Extent Rented Venue Out

Rented Venue to another Organization or Individual



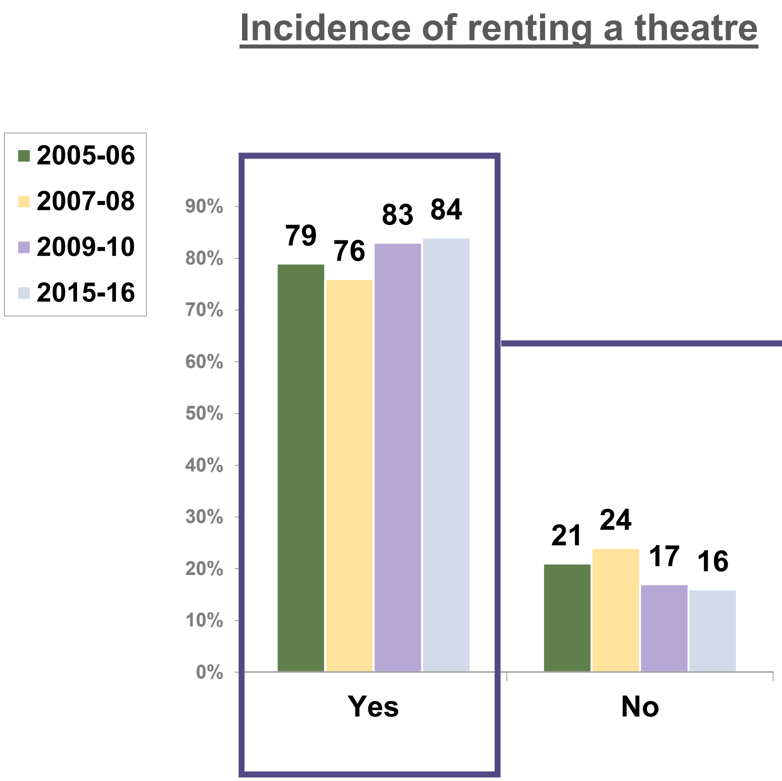
How the Rented Venue was Used



Q.4 Have you ever rented your venue to another organization or individual?
Base: Yes at Q1 (n=22)

Q.5 How was the rented venue used? (Please check all that apply)
Base: Yes at Q4 (n=22)

TAPA Member Theatre Venues – Incidence of Renting



Median capacity of rented theatre venues
150

Q.6 Has your organization rented venues in the past to host productions?
Base: Total respondents (n=69).
Q.7 What is the average number of seats of the venues that you typically rent?
Base: Those organizations who rented theatres in the past (n=58)

Overall 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	Total Sample Phase IV
n=	92	80	67
	%	%	%
Very suitable	38	30	52
Somewhat suitable	55	61	40
Somewhat unsuitable	4	8	6
Very unsuitable	3	1	2

What is the main reason this theatre is unsuitable for your productions?	Those who said venue is unsuitable
n=	5
	%
Repairs/Renovations	20
Too small	-
Environmental issues	-
Accessibility issues	-
Poor location	-
Other reasons	80

Q.8 Thinking about the venue(s) you use for productions, your own or rented, how suitable or unsuitable is the venue(s) you typically use for your productions?
Base: Total respondents (n=67)
Q.9 And what is the main reason this venue is unsuitable for your productions?
Base: Those organizations who reported that the theatre they typically use is unsuitable for their productions (n=5)

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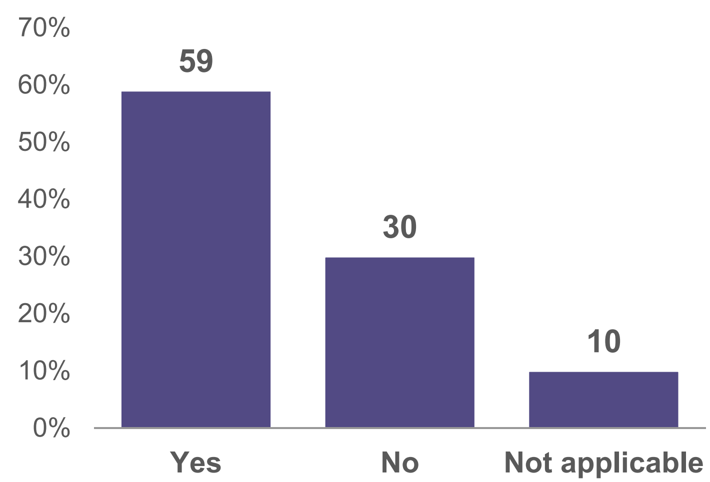
SCHOOLS

Schools

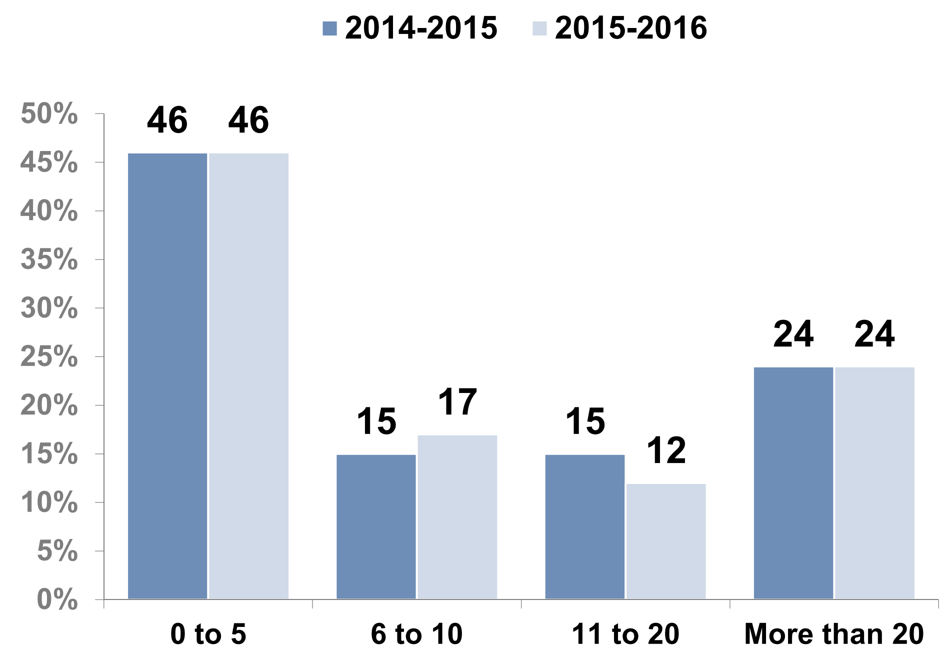
- Six-in-ten (59%) member companies count schools or school groups as part of their audience at their venues.
- 46% of member companies host between one and five school groups for performances (including dress rehearsals) over the course of a theatre season, unchanged from the previous wave, while a quarter (24%) host more than 20 over the same span (also unchanged from previous wave).
- Roughly seven-in-ten (68%) have designated matinee performances in order to accommodate school audiences.
- Only 5% (though this figures varies slightly across the sample phases) are TVA-mandated companies.
- Unfortunately, due to the very sample sizes involved (between 1 and 4) it is hard to draw even the most general conclusions from the set of sub-questions related to TVA-mandated companies.

Schools as Part of the Audience

Schools or School Groups Part of Audience at venue(s) or Rented Venue(s)



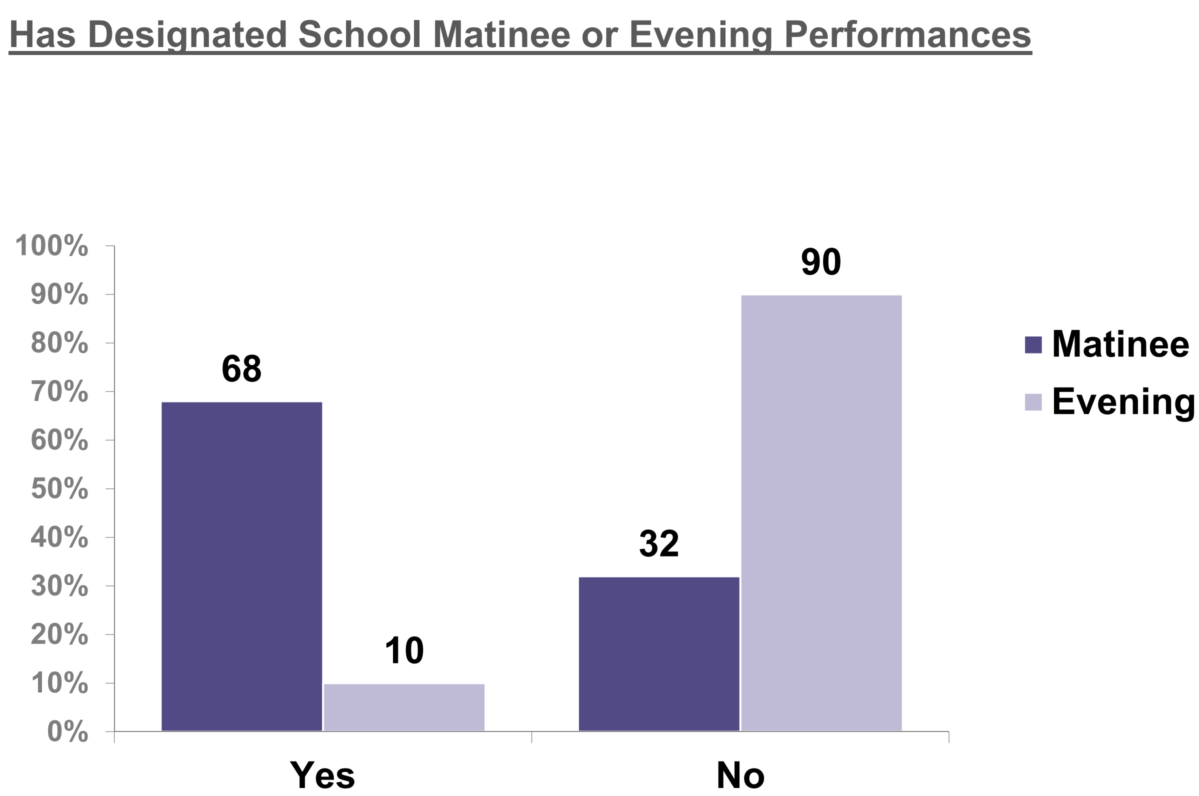
Percentage of School Groups Attending an Organization's Performances, Including Dress Rehearsals



Q.24 Are schools and or school groups part of your audience at your venue(s)or a rented venue(s)?
Base: Total respondents (n=69)

Q.25 How many school groups attended one of your organization's performances (both school designated and non school designated) and including dress rehearsals in each of the following theatre seasons?
Base: Yes at Q24 (n=41)

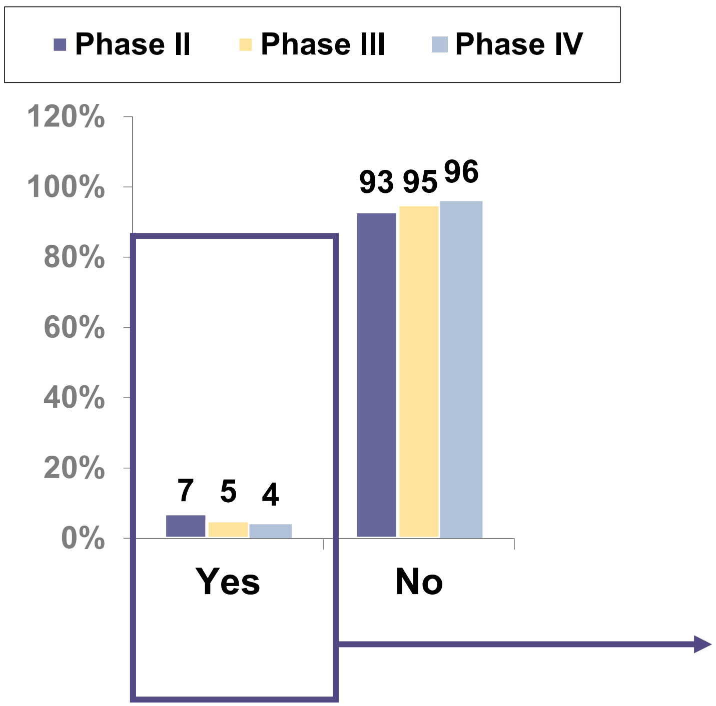
Among those with School Audiences: Extent have Designated Performances



Q.26 Do you have designated school matinee and or evening performances?
Base: Yes at Q24 (n=41)

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**	**TYA-mandated companies Phase IV**
	#	#	#
Schools	4	3	2
Theatres	6	3	2
Non-School/Non-Theatre venues, i.e., community centres, libraries	3	1	2
Other			1

Q.27 Are you a TYA-mandated company?
Base: Total respondents (n=69)
Q.11 Do you perform in…?
Base: Self-identified TYA-mandated companies (n=3)

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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
n=	4	4	4	4	3	3	3	3
Total number of students who attended performances	**83,500**	**7,110**	**90,750**	**7,300**	**86,500**	**2,500**	**86,500**	**2,500**

	2014/15		2015/16	
	Schools	Non- School/ Non-Theatre	Schools	Non- School/ Non-Theatre
n=	1	1	1	1
Total number of students who attended performances	**100,000**	**500**	**100,000**	**0**

Q.29 Approximately, how many students attended your performances in schools and how many in non-school/non-theatre venues for each year?
Base: Self-identified TYA-Mandated Companies

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

	2006/07	2007/08	2008/09	2009/10	2014/15	2015/16
n=	4	4	3	3	1	1
< 50 Percent	1	1	1	1	1	1
50 Percent to 80 Percent	2	2	2	2	0	0
Greater than 81 Percent	1	1	0	0	0	0

Q.28 Thinking of all school and non-school/non-theatre venues you performed in, approximately what percentage of these venues were located in Toronto's 31 "at risk" neighbourhoods?
Base: Self-identified TYA-mandated companies who perform in schools

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

Paid By	Schools			Non-School/Non-Theatre		
	Phase II	Phase III	Phase IV	Phase II	Phase III	Phase IV
n=	**4**	**3**	**2**	**4**	**3**	**2**
Student	1	2	1	0	1	-
School / School board	1	3	2	1	2	1
Grants	1	0	1	2	0	1
Other	1	2	-	0	1	1

Q.30 How are your performances in schools and non-school/non-theatre venues usually paid for?
Base: Self-identified TYA-Mandated Companies (n=2)

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FESTIVALS

Festivals

- Roughly a third (30%, up slightly from 2014/15) performed at a festival in the Toronto area during the last two seasons.
- For four-in-ten (41%) member organizations, performing in festivals is part of their regularly scheduled season.

Festival Performances

Did your company perform in a Festival in Toronto?	2006/07	2007/08	2008/09	2009/10	2014/15	2015/16
	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL
n=	92	92	80	80	69	69
	%	%	%	%	%	%
Yes	29	32	24	24	28	30
No	71	68	76	76	72	70

Q.12 Did your company perform in any festivals in the City of Toronto in the last two seasons?
Base: Total respondents (n=69)

Festival Performances

Are Festivals part of your regularly scheduled season?	2007/08	2009/10	2015/16
	TOTAL	TOTAL	TOTAL
n=	35	25	27
	%	%	%
Yes	43	36	41
No	49	56	56
We Are a Festival	9	8	4

Q.31 Are festivals part of your regularly scheduled season?
Base: Yes to either at Q12 (n=27)

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PRODUCTIONS AND PERFORMANCES

Production and Performances

- In all, 17% of member organizations have presented more than 10 productions in each of the last two seasons, namely, 2014/15 and 2015/16, with the median number of productions presented being 5 and 4, respectively.
- This is significantly more productions undertaken than earlier phases of this research.
- While the number of productions is up, this has not necessarily increased the overall number of performances. However, while the median number for the last two seasons is in line with other seasons, what is clear is that fewer companies are putting on less than 10 performances in a year.
- This suggests that some companies, that in previous waves were putting on 10 performances or fewer a season, are now putting on between 11 and 25. This result may be related to the increase in the number of productions, but also suggests that the increase in productions for some companies is not necessarily leading to longer production runs, but to more overall performances as a result of more productions.
- The increase in the number of performances in the 10 – 25 performance range is not reflected in an increase in the median number of performances overall. This is due to the fact that fewer companies, in the last two seasons, were putting on more than 100 performances per season.

Productions Presented by TAPA Member Organizations

	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL
n=	86	86	92	92	80	80
	%	%	%	%	%	%
2 or Less	57	55	53	46	55	51
3 to 5	12	13	17	23	19	24
6 to10	20	17	19	16	11	11
More than 10	11	15	11	15	15	13
Median Number of Productions	2	2	2	3	2	2

	2014/15	2015/16
	TOTAL	TOTAL
n=	52	63
	%	%
2 or Less	21	38
3 to 5	38	21
6 to10	23	24
More than 10	17	17
Median Number of Productions	5	4

Q.13 In the space provided below please indicate the number of productions your organization has presented in each of the following venues for the 2014-15 and 2015-16 theatre seasons.
Base: Total respondents

Performances Presented by TAPA Member Organizations

	2004/05	2005/06	2006/07	2007/08	2014/15	2015/16
	TOTAL	**TOTAL**	**TOTAL**	**TOTAL**	**TOTAL**	**TOTAL**
n=	**86**	**86**	**82**	**82**	**52**	**63**
	%	**%**	**%**	**%**	**%**	**%**
10 or Less	27	24	29	22	13	14
11 to 25	25	24	24	28	33	43
26 to 100	24	27	26	26	33	25
More than 100	22	25	21	24	21	17
DK/NA/Ref	2	-	-	-	-	-
Median Number of Performances	23	31	23	25	28	23

Q.14 For all of your productions cited, how many performances took place in each of the following categories during the seasons listed below.
Base: Respondents who do not perform exclusively in festivals, schools or non-school/non-theatre venues (n=xx)
** Note: Question wording changed slightly from the previous wave of the survey (2004/05 and 2005/06).

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AUDIENCES

Audiences

- The estimates of the number of unique audience members made by TAPA respondents should be treated with caution, as 62% were not able to answer the question. And this suggest that many TAPA member companies either do not have the systems in place to track this kind of data or have significant walk up traffic.

- Among those who did, the median number of unique (non-festival/non-in-school) audience members who attended their performances was up in the 2015/16 season compared to previous seasons and now stands at the highest number recorded since surveying began.

- This increase may be a result of the increase in performances in the 11 – 25 range. However, as noted, due to the large number of don't knows estimates should be treated with caution.

- More reliable responses can be found in estimates of total audience for each season. For these responses, well over half of members report attendance being up in both 2014/15 and 2015/16 and above estimates for previous seasons. The implication is that overall audiences continue to grow.

- Limitations in data gathering ability are also evident in responses to questions relating to the geographic dispersion of audiences. Half were not able to identify the proportion originating outside of the City of Toronto and 62% from outside of Canada.

- Among those making an estimate, the median is that about a quarter are from outside the City and this is in line with 2009/10 estimates. Both 2015/16 and 2009/10 data do, though, show an increase in estimates for those from outside Toronto and suggest that there have been long term shifts with slightly more audiences coming from outside the City compared with the early part of the decade.

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Unique Audience Members (non-festival/non-school)

	Total Sample: Unique Members					
	2004/05	2005/06	2006/07	2007/08	2014/15	2015/16
n=	86	86	92	92	69	69
500 or Less	42	29	19	21	31	19
501 to 1000	15	25	13	15	12	15
1001 to 2000	12	16	21	21	12	12
2001 to 20,000	17	16	28	26	23	31
More than 20,000	15	14	19	17	23	23
DK/NA/Ref	44	43	49	49	62	62
Median number of unique audience members	900	1,000	2,000	1,500	1542*	2425*

Q.23 A unique audience member is a patron who is counted only once regardless of the number of performances attended. If you had to estimate, approximately how many unique (non-festival/non-in-school) audience members attended your organization's performances in the 2014-2015 season? And in the 2015-2016 season?
Base: Total respondents
Note: Percentages exclude "don't know" responses
Note: * Including those reporting zero audiences

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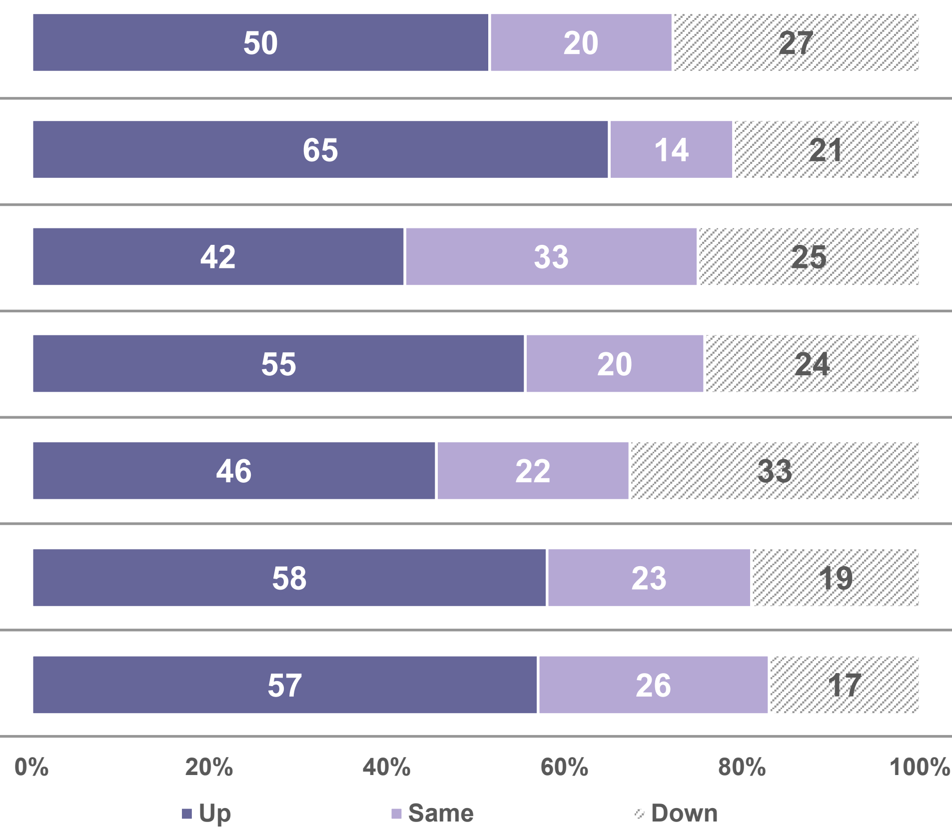
Comparison of Total Attendance

Changes in Total Attendance Between Seasons

	Up	Same	Down	Average Increase %	Average Decrease %
Between 2004/05 and 2005/06	50	20	27	69	33
Between 2005/06 and 2006/07	65	14	21	N/A	N/A
Between 2006/07 and 2007/08	42	33	25	33	35
Between 2007/08 and 2008/09	55	20	24	N/A	N/A
Between 2008/09 and 2009/10	46	22	33	39	24
Between 2013/14and 2014/15	58	23	19	N/A	N/A
Between 2014/15 and 2015/16	57	26	17	39	40



Q.20 Compared to the 2013/14 season, was your total attendance up, down or the same for the 2014-2015 season?
Q.21 Compared to the 2014-2015 season, was your total attendance up, down or the same for the 2015-2016 season?
Q.22 By what percentage is your attendance [insert response to Q.21] for the 2015-2016 season?
Base: Total respondents (n=69, Q22: Avg. increase n=39, Avg. decrease n=12)

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 City of Toronto 2015/16
n=	39	40	42	34
	%	%	%	%
10 percent or less	44	40	31	32
11 percent to 25 percent	28	30	31	32
26 percent to 50 percent	15	20	21	24
More than 50 percent	13	10	17	12
DK/NA	55	57	48	51

	Location of Audience Members			
	Outside Canada 2005-06	Outside Canada 2007-08	Outside Canada 2009/10	Outside Canada 2015/16
n=	34	35	80	26
	%	%	%	%
10 percent or less	94	94	97	100
11 percent to 25 percent	3	-	-	-
26 percent to 50 percent	3	3	3	-
More than 50 percent	-	3	-	-
DK/NA	61	62	53	62

Q.18 Approximately what percentage of your total (non-festival) 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 to the best of your knowledge, what percentage of your total audience is from outside of Canada?
Base: Total respondents (Outside City of Toronto n=34, Outside Canada n=26)
Note: Percentages exclude “don’t know” responses.

Location of Audience Members

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

	Average 2015-16
	%
Outside City of Toronto	26
Outside Canada	2

Q.18 Approximately what percentage of your total (non-festival) 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 to the best of your knowledge, what percentage of your total audience is from outside of Canada?
Base: Total respondents (Outside City of Toronto n=34, Outside Canada n=26)
Note: Percentages exclude “don’t know” responses.

10

TICKETS

Tickets

- The share of organizations that sell single tickets only remains relatively stable over the four phases as does those who also selling subscriptions.

- Overall the number of single tickets sold by TAPA members organizations in 2015/16 (2.3 million) is up over both 2014/15 and 2009/10, but is still slightly below earlier peak years. This is problematic, given the continuing increase in the population of the City and the region. The recently released 2016 Census numbers show a 4.5% increase in the population of the City of Toronto over 2011 and a 6.2 % increase in the Toronto Census Metropolitan Area (which is roughly the GTA). This suggests that there continues to be the potential to grow the audience for TAPA member companies.

- The average number of tickets sold per respondent organization has increased for 2015/16, over earlier years, but this may well be an artifact of the fact that fewer member organizations responded to the survey this time than in previous phases. Furthermore, this fact may also have influenced the estimates of the number of tickets sold. Earlier in this report, over half of member organizations responding to the survey reported that audiences had increased and few said they had declined, yet the tickets sold numbers do not reflect this reported increase.

- Subscription sales are relatively unchanged for both the last two season and in line with Phase 111 findings (133,000). In other words, subscription sales have sustained the increase noted over the first two phases of the TAPA Stats Report.

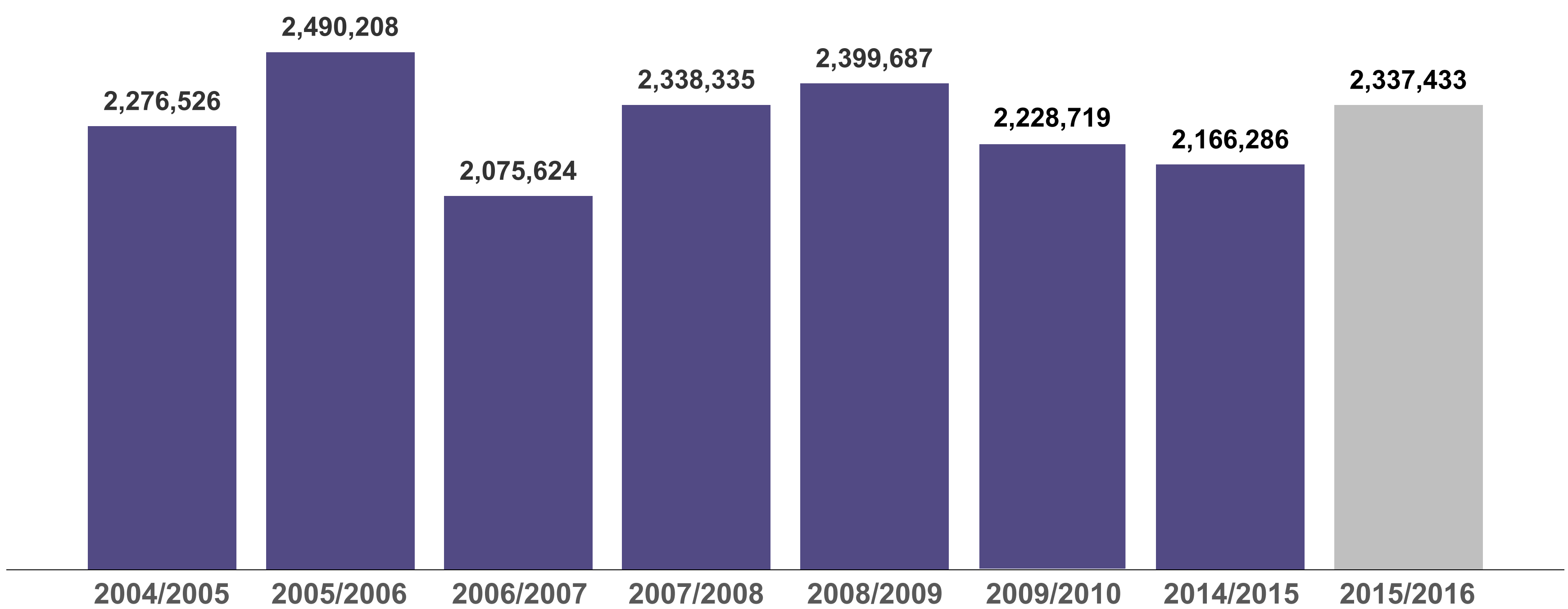
- One other intriguing finding, which may also have an impact on the data available to TAPA members about their audiences is that 61% report that a proportion of their ticket sales are to walk-ups and that they account on average (median) for 13% of ticket sales.

Single Tickets and Subscriptions

	Total Phase I	Total Sample Phase II	Total Sample Phase III	Total Sample Phase IV
n=	86	81	80	69
	%	%	%	%
Single Tickets only	74	72	71	74
Single Tickets and Subscriptions	26	28	29	26

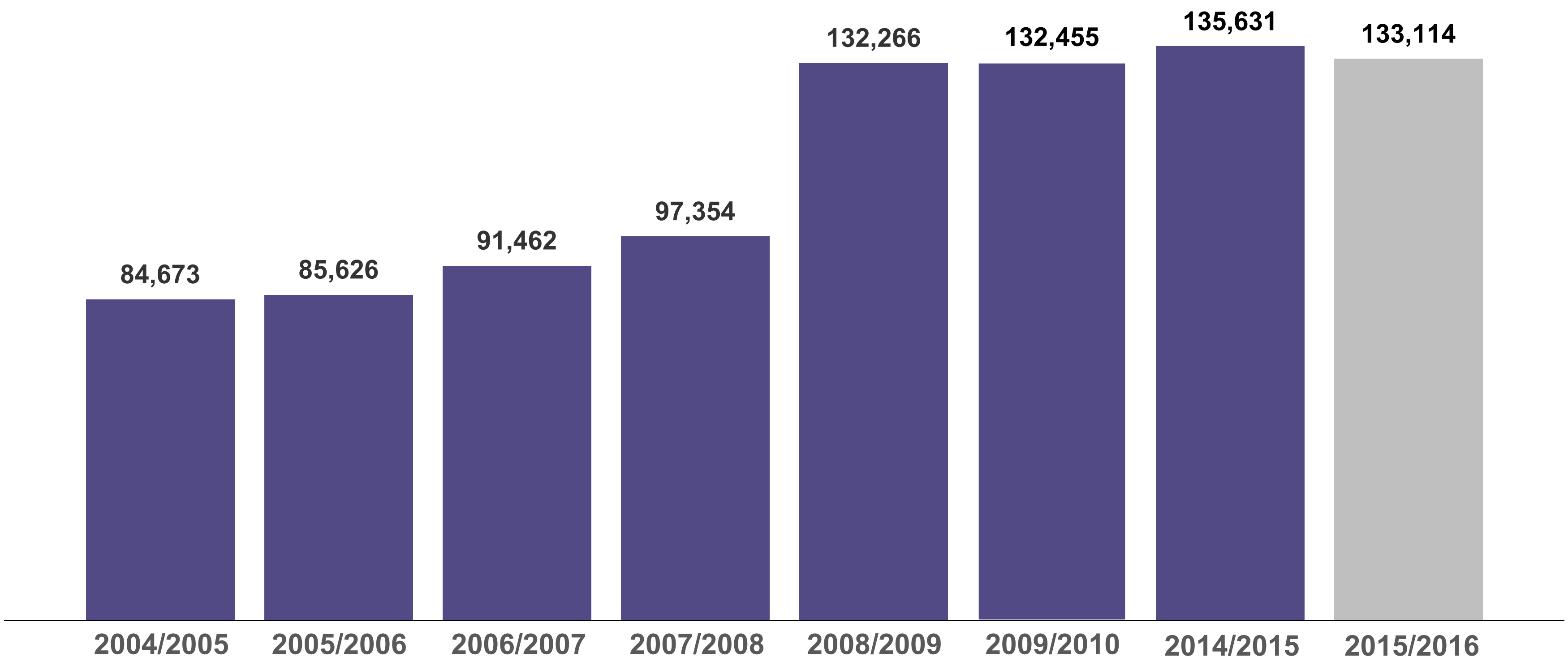
Q.15 Does your organization sell single tickets only or does it also sell subscriptions?
Base: Total respondents (n=69)

Non-Festival, Non-In-School Single Tickets Sold



Q.16 How many (non-festival/non-in-school) paid single tickets did your organization sell in each of the seasons shown below? 2014-2015, 2015-2016?
Base: Those organizations that report selling single tickets @Q15 2014-15 (n=69), 2015-16 (n=69)

Non-Festival, Non-In-School Subscriptions Sold



Q.17 How many paid subscriptions did your organization sell in each of the seasons shown below?
Base: Those organizations selling paid subscriptions @Q15 2014-15 (n=18), 2015-16 (n=18)

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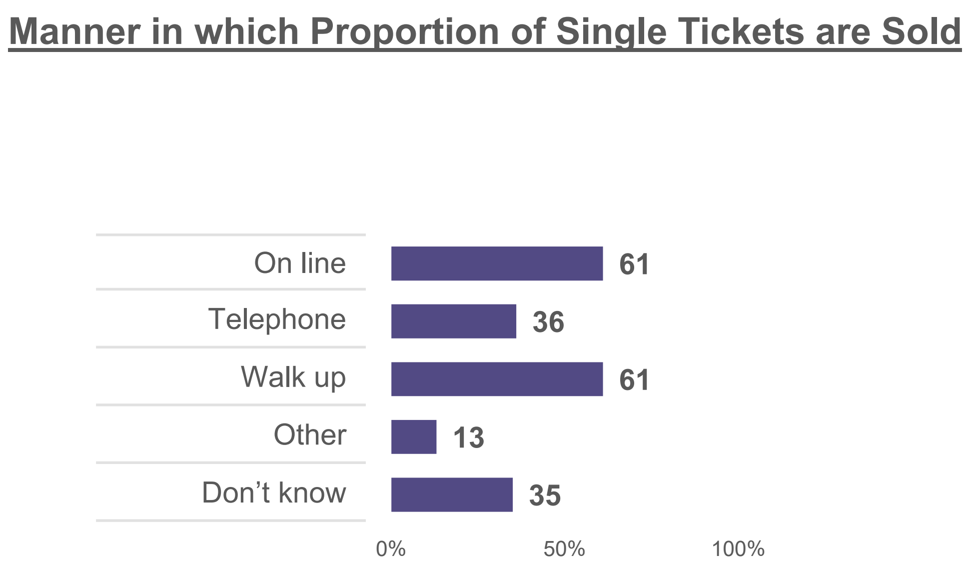
Non-Festival, Non-in-School Single Tickets

	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2014/15	2015/16
n=	81	83	81	81	79	80	69	69
Number of Single Tickets Sold	2,276,526	2,490,208	2,075,624	2,338,335	2,399,687	2,228,719	2,166,286	2,337,433
Average Number of Single Tickets Sold	28,105	30,003	25,625	28,868	29,996	27,859	31,395	33,876
Median Number of Tickets Sold	1,200	1,500	1,440	1,800	1,375	1,174	1,000	1,800

Q.16 How many (non-festival/non-in-school) paid single tickets did your organization sell in each of the seasons shown below?
Base: Those organizations that report selling single tickets @Q15 (n=69)
** 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 subscriptions did your organization sell in each of the seasons shown below?
Base: Those organizations selling paid subscriptions @Q15 (n=18)

How Tickets are Sold



Q.53 What proportion of single tickets are sold in the following manner?
Base: Total respondents (n=69)

11

REVENUE

Revenue

- Total income from various sources – ticket sales, fundraising, etc. – was well up, for both the 2014/15 and the 2015/16 seasons, compared with previous seasons.

- The increase for both seasons is almost exclusively from increases in revenues from single ticket sales and this is despite limited increases in the number of tickets sold. The implication here is that revenue increases are coming from increased ticket prices. Further, increased prices do not appear to have driven audience numbers down, although they may have limited increases in audiences over the last two seasons.

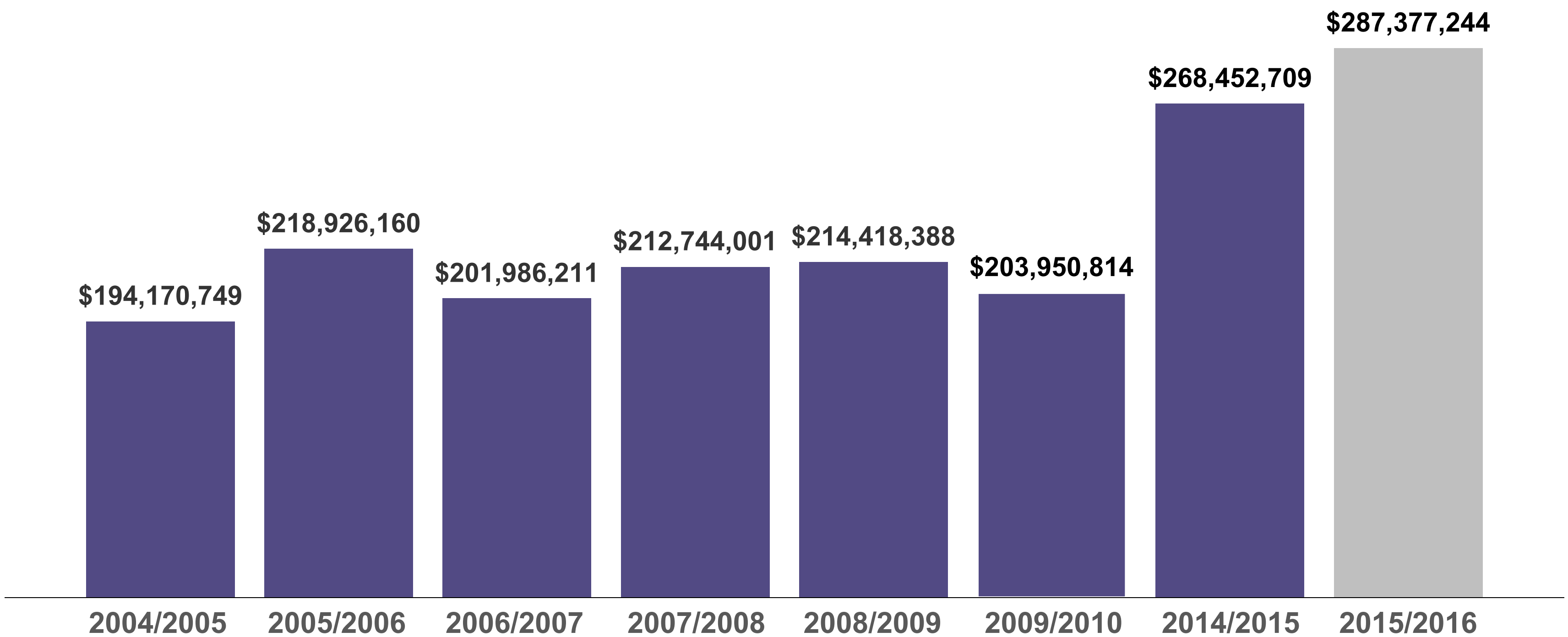
- Further, a closer examination of other revenue sources shows that revenue from government grants for the last two seasons is down over 2008/09 and 2009/10, although those two seasons appear to have been exceptions.

- In terms of revenue from fundraising, while this is relatively unchanged overall, there are shifts within the various forms of fundraising. The largest single source of fundraising continues to be individual donations, including special events, with donations from corporations, including sponsorships, showing a significant decline from 2009/10 and is well below the amounts raised from the public. Moreover, there has been a significant decline in revenue from sponsorships that has not been offset by an increase in corporate donations.

- A new question relating to endowments was asked this phase and showed that 29% of member organizations have an endowment. Collectively, these endowments are valued at $50 million.

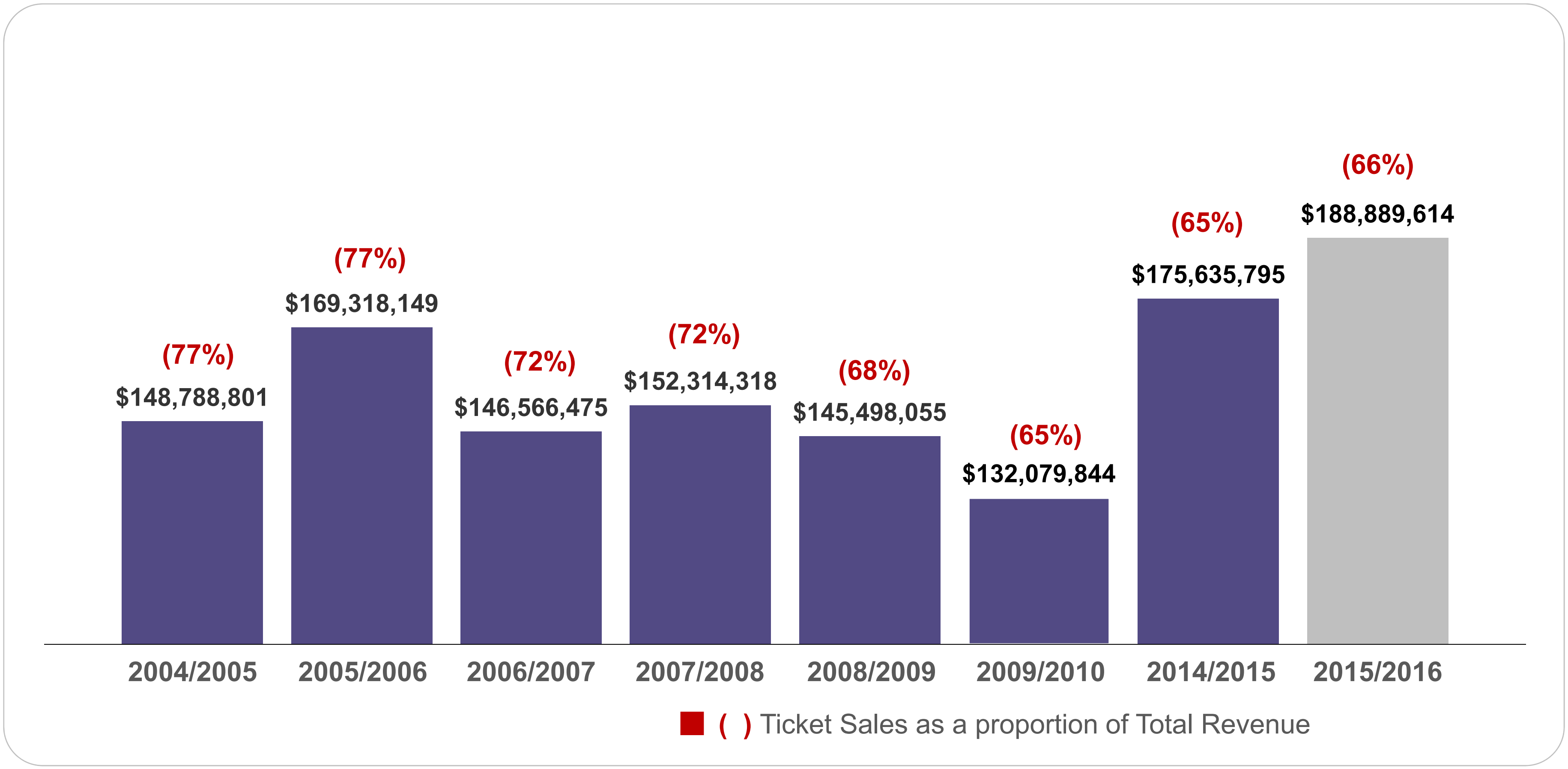
Total Revenue – Excluding Rental Income

- When accounting for rental income, total revenue exceeded $290 million in 2015/16.



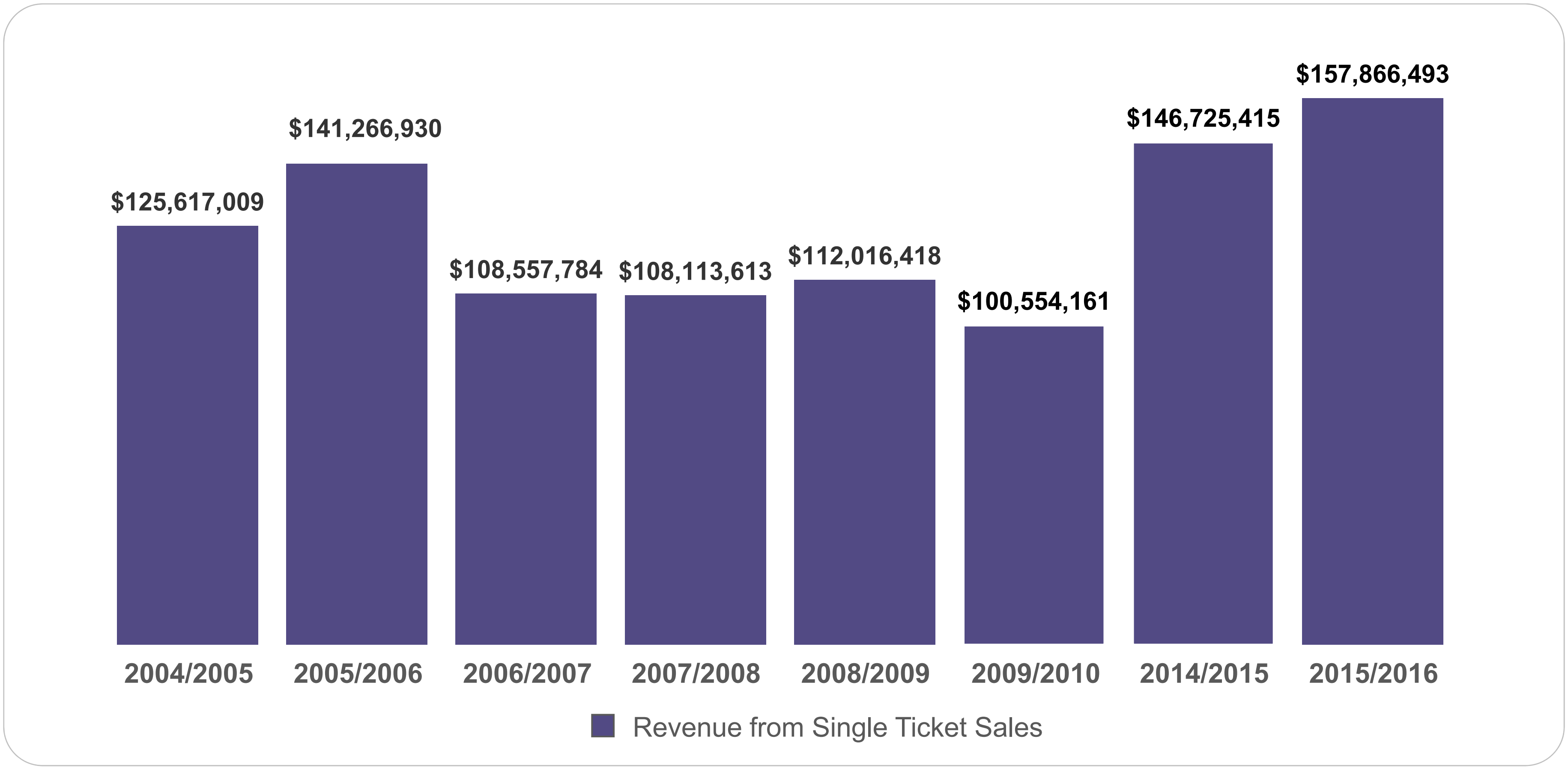
Q.33 In the spaces provided below, please list your total revenue from each of the following sources for both the 2014-2015 and 2015-2016 theatre seasons.
Base: Among those who reported their financial information. Base sizes vary.
** Note: This Excludes Rental Income

Total Ticket Sales Revenue (Including Single Tickets and Subscriptions)



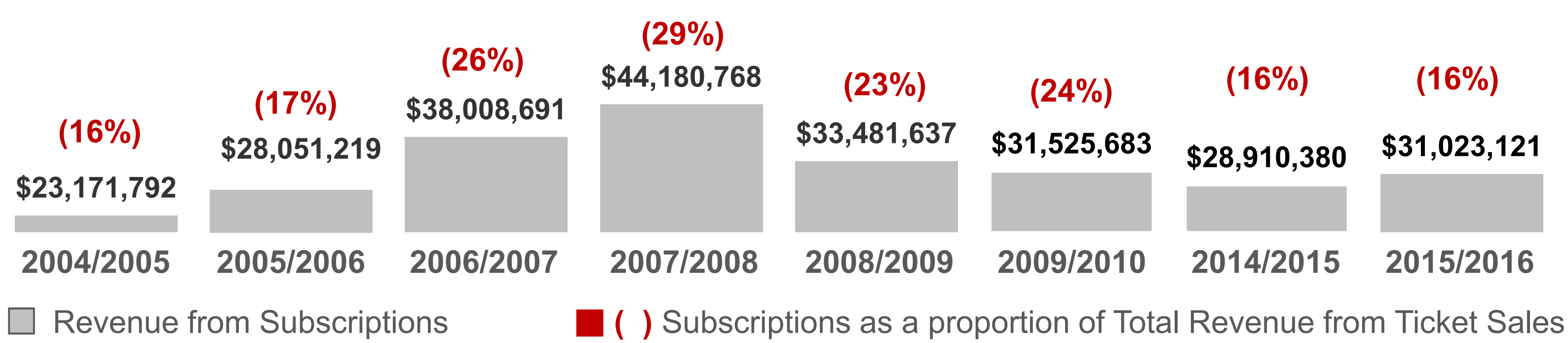
Q.33 In the spaces provided below, please list your total revenue from each of the following sources for both the 2014-2015 and 2015-2016 theatre seasons.
Base: Among those who reported their financial information. Base sizes vary.
** Note: This Excludes Rental Income

Revenue from Single Ticket Sales



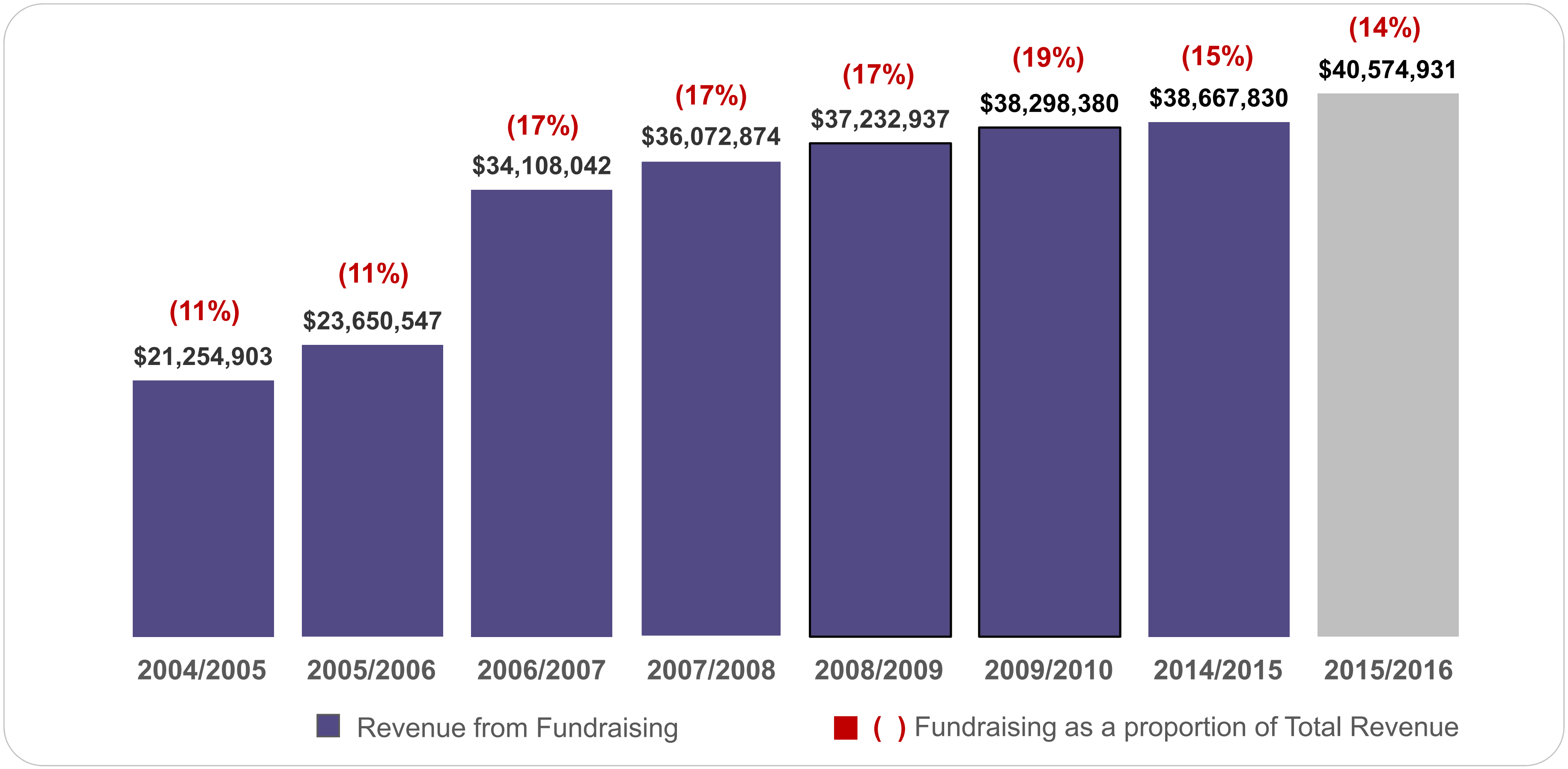
Q.33 In the spaces provided below, please list your total revenue from each of the following sources for both the 2014-2015 and 2015-2016 theatre seasons.
Base: Among those who reported their financial information. Base sizes vary.
** Note: Proportions are based on the total revenue excluding Rental Income

Revenue from Subscriptions



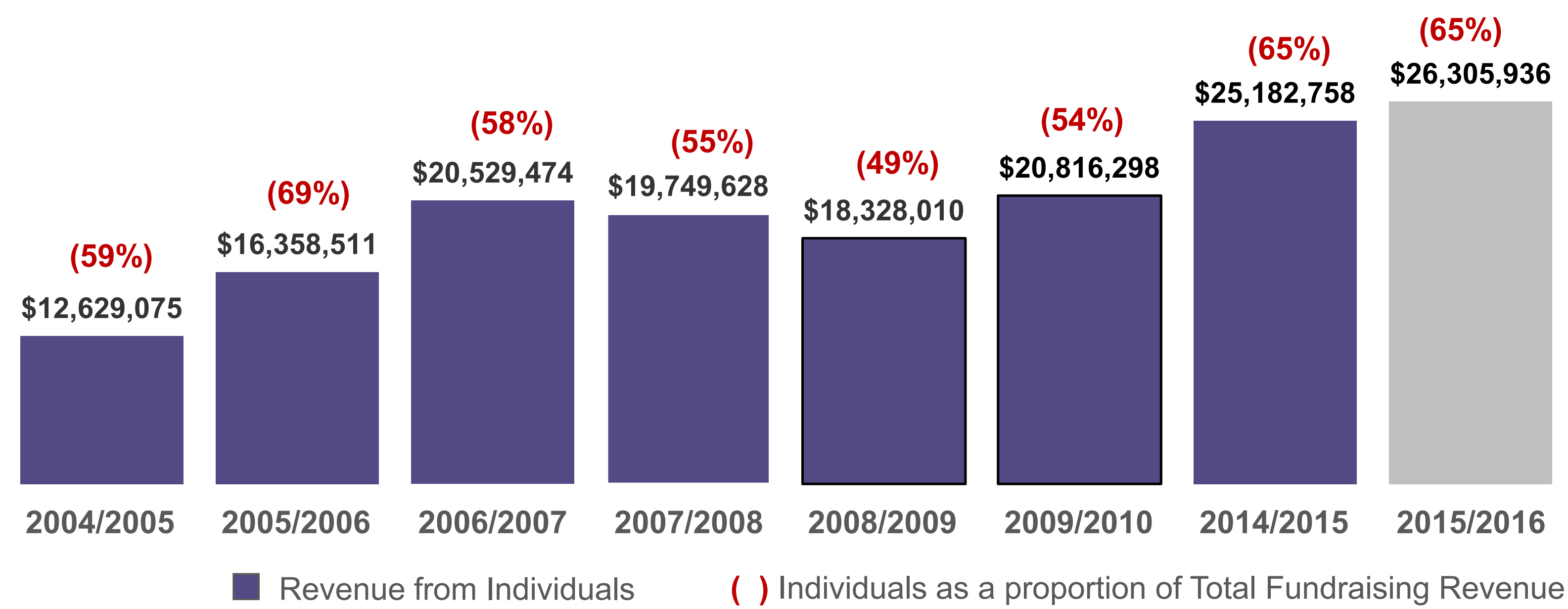
Q.33 In the spaces provided below, please list your total revenue from each of the following sources for both the 2014-2015 and 2015-2016 theatre seasons.
Base: Among those who reported their financial information. Base sizes vary.
** Note: Proportions are based on the total revenue excluding Rental Income

Revenue from Fundraising



Q.33 In the spaces provided below, please list your total revenue from each of the following sources for both the 2014-2015 and 2015-2016 theatre seasons.
Base: Among those who reported their financial information. Base sizes vary.
** Note: Proportions are based on the total revenue excluding Rental Income

Fundraising: Revenue from Individuals/Special Events/Endowments/Crowd Sourcing



Q.33 In the spaces provided below, please list your total revenue from each of the following sources for both the 2014-2015 and 2015-2016 theatre seasons.
Base: Among those who reported their financial information. Base sizes vary.
** Note: Proportions are based on the total revenue excluding Rental Income

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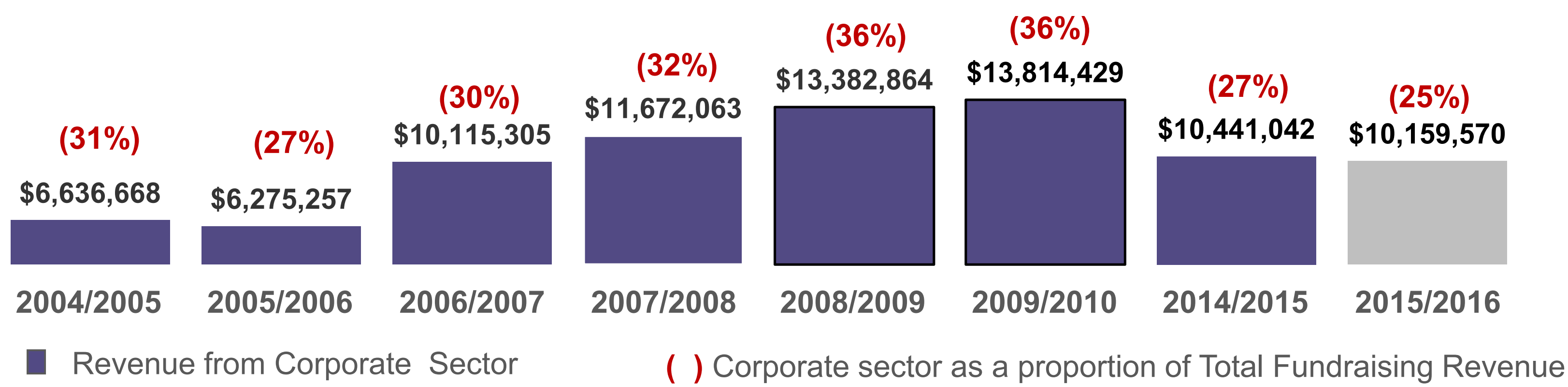
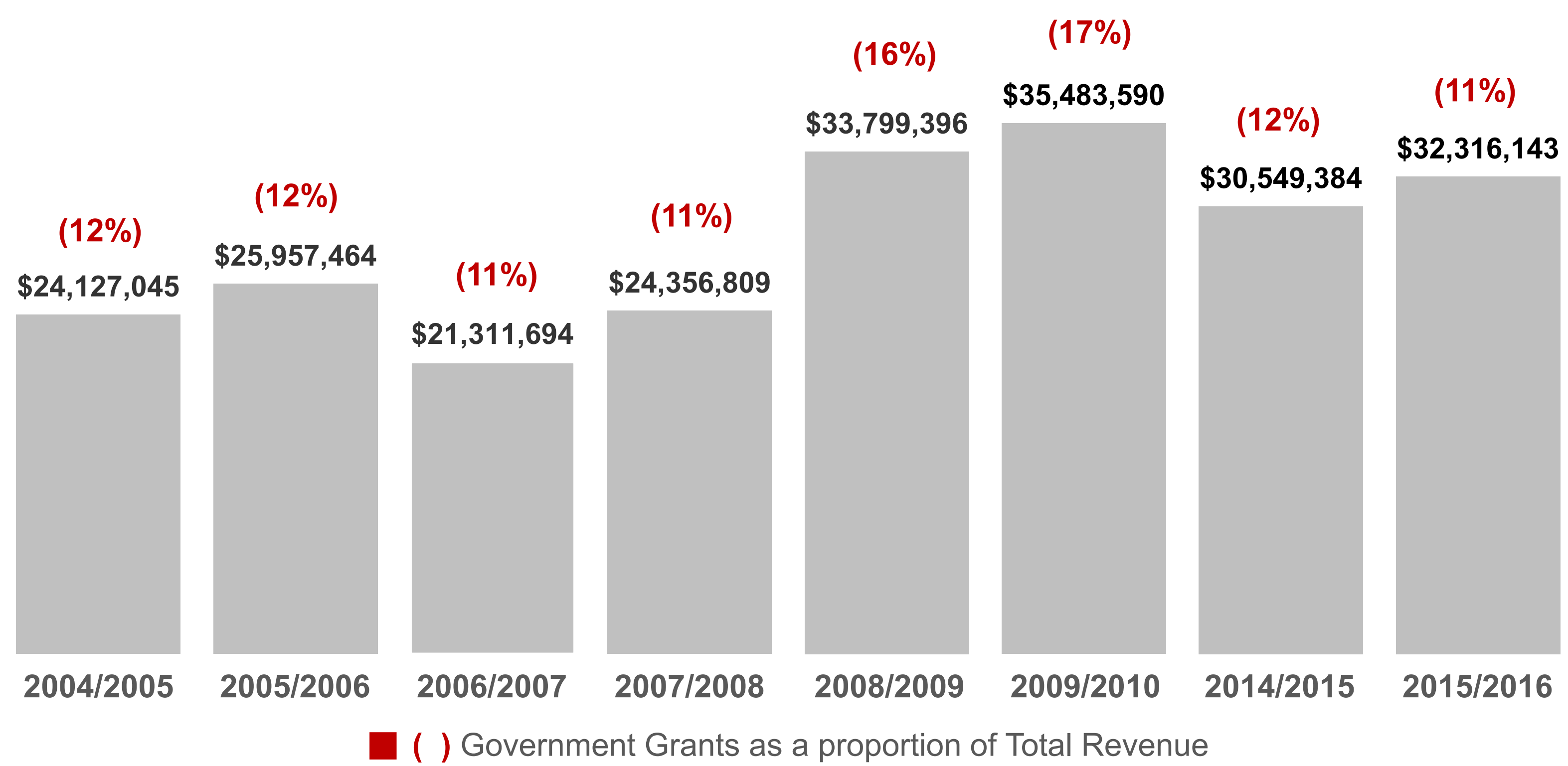
Fundraising: Revenue from Corporate Donations/Sponsorship



Q.33 In the spaces provided below, please list your total revenue from each of the following sources for both the 2014-2015 and 2015-2016 theatre seasons.
Base: Among those who reported their financial information. Base sizes vary.
** Note: Proportions are based on the total revenue excluding Rental Income

Revenue from Government Grants



Q.33 In the spaces provided below, please list your total revenue from each of the following sources for both the 2014-2015 and 2015-2016 theatre seasons.
Base: Among those who reported their financial information. Base sizes vary.
** Note: Proportions are based on the total revenue excluding Rental Income

Revenue Sources for TAPA Member Organizations (Excluding Rental Income)

	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
Q.33 In the spaces provided below, please list your total revenue from each of the following sources for both the 2014-2015 and 2015-2016 theatre seasons.
Base: Among those who reported their financial information. Base sizes vary.

Revenue Sources for TAPA Member Organizations (Excluding Rental Income, but Including Other Income)

	2014/15 TOTAL		2015/16 TOTAL	
	$	% of Total	$	% of Total
Grand Total	**268,452,709**	**100**	**287,377,244**	**100**
Ticket Sales	**175,635,795**		**188,889,614**	
Single Ticket Sales	146,725,415		157,866,493	
Subscription Sales	28,910,380		31,023,121	
Fundraising	**38,667,830**		**40,574,931**	
Individual Donations	15,906,966		17,023,815	
Corporate Donations	3,707,154		3,583,631	
Sponsorships	6,733,888		6,575,939	
Foundations	3,044,030		4,109,415	
Special Events	4,835,696		4,789,763	
Endowments	4381270		4,421,887	
Crowd funding	58,826		70,481	
Government Grants	**30,549,384**		**32,316,143**	
City	7,658,099		8,373,373	
Provincial	12,820,568		13,494,995	
Federal	10,070,717		10,447,775	
Other	**21,007,170**		**21,717,236**	

Q.33 In the spaces provided below, please list your total revenue from each of the following sources for both the 2014-2015 and 2015-2016 theatre seasons.
Base: Among those who reported their financial information. Base sizes vary.

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Revenue Sources for TAPA Member Organizations (Including Rental Income)

	2008/09		2009/10		2014/15		2015/16	
	TOTAL		TOTAL		TOTAL		TOTAL	
	$ Including Rental Income	% of Total Including Rental Income	$	% of Total Including Rental Income	$	% of Total Including Rental Income	$	% of Total Including Rental Income
Grand Total	230,082,022	**100**	216,233,513	**100**	**272,671,028**	**100**	**291,366,517**	**100**
Ticket Sales	145,498,055	**63**	132,079,844	**61**	**175,635,795**		**188,889,614**	
Single Ticket Sales	**112,016,418**	77	100,554,161	76	146,725,415		157,866,493	
Subscription Sales	33,481,637	23	31,525,683	24	28,910,380		31,023,121	
Fundraising	37,232,937	**16**	38,298,380	**18**	**38,667,830**		**40,574,931**	
Individual Donations	14,619,971	39	16,067,920	42	15,906,966		17,023,815	
Corporate Donations	3,952,324	11	4,095,645	11	3,707,154		3,583,631	
Sponsorships	9,430,540	25	9,718,784	25	6,733,888		6,575,939	
Foundations	5,522,063	15	3,667,653	10	3,044,030		4,109,415	
Special Events	2,458,466	7	3,551,712	9	4,835,696		4,789,763	
Endowments	1,249,573	3	1,196,666	3	4,381,270		4,421,887	
Crowd funding	-	-	-	-	58,826		70,481	
Government Grants	33,799,396	**15**	35,483,590	**16**	**30,549,384**		**32,316,143**	
City	7,241,693	21	6,899,487	19	7,658,099		8,373,373	
Provincial	12,739,043	38	14,102,396	40	12,820,568		13,494,995	
Federal	13,818,660	41	14,481,707	41	10,070,717		10,447,775	
Other					**21,007,170**		**21,717,236**	
**Rental Income	15,663,634	7	12,282,699	6	**4,218,319**		**3,989,273**	

Q.33 In the spaces provided below, please list your total revenue from each of the following sources for both the 2014-2015 and 2015-2016 theatre seasons.
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.34 For each of the following, please indicate if the contributions are up, down or the same for the 2015-2016 theatre season, compared to the 2014-2015 season.
Base: Total respondents (n=69)

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

	Change in 2015-2016 Compared to 2014-2015	Average Increase or Decrease between 2014/15 and 2015/16 (%)
	%	%
Corporate Donations		
Increase	29	39
Remained the Same	51	N/A
Decrease	20	26
Foundation Grants		
Increase	30	45
Remained the Same	57	N/A
Decrease	13	34
Government Grants		
Increase	25	33
Remained the Same	51	N/A
Decrease	25	17
Individual Donations		
Increase	42	39
Remained the Same	39	N/A
Decrease	19	24
Special Events		
Increase	33	43
Remained the Same	49	N/A
Decrease	17	59
Endowments		
Increase	9	8
Remained the Same	86	N/A
Decrease	6	29

Q.34 For each of the following, please indicate if the contributions are up, down or the same for the 2015-2016 theatre season, compared to the 2014-2015 season.
Base: Total respondents (n=69)

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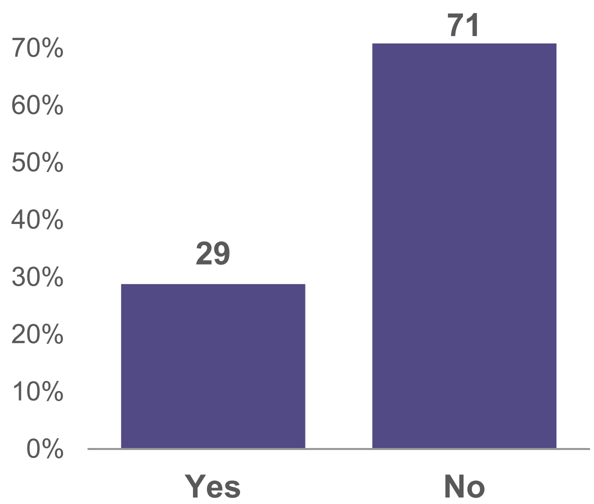
Endowments

Has An Endowment



Total Value of Endowment

Total value for all companies	$50,00,000

Q.35 Do you have an endowment?
Base: Total respondents (n=69)
Q.36 What is the approximate value of the endowment?
Base: Yes at Q35 (n=20)

12

STAFF

Staff

- There are 1556 artistic staff currently under the employ of member organizations, down from 1937 in the last wave (2009/10).
- There are 1488 non-artistic staff currently under the employ of member organizations, down from 1913 in the last wave (2009/10).
- The above figures document a steady decline in staff levels - both artistic and non-artistic - from the peaks reported in the benchmark survey of 2005/06.
- This decline is in sharp contrast to increases in the number of jobs in the City (based on Statistics Canada's Labour Force Survey). In 2005, there were an estimated 1.26 million jobs in the City and by 2015 this had increased to 1.42 million an increase of 13%. In the same time period, the number of jobs reported by TAPA members declined by 61%.

Number of Artistic and Non-Artistic Employees

	Total 2005-2006	Total 2007-08	Total 2009-10	Total 2015-16
n=	86	92	80	69
	#	#	#	#
Non-Artistic Employees				
Full-time	15%	17%	18%	20%
Part-time	31%	18%	32%	29%
Total	**3535**	**2155**	**1913**	**1488**
Artistic Employees				
Full-time	5%	16%	11%	13%
Part-time	49%	49%	39%	28%
Total	**4183**	**3938**	**1937**	**1556**
Grand Total	**7718**	**6093**	**3850**	**3044**

Q.37 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.38 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 2015-2016 season.
Base: Total respondents

13

MARKETING

Marketing

- Member organizations continue to use a wide variety of channels to market performances. However, there has been a significant decline in the reported use of both newspapers and magazines. For the 2005/06 season, 81% and 55%, respectively, reported the use of newspapers and magazines for advertising performances; in 2015/16 this had declined to 61% and 41%, respectively.

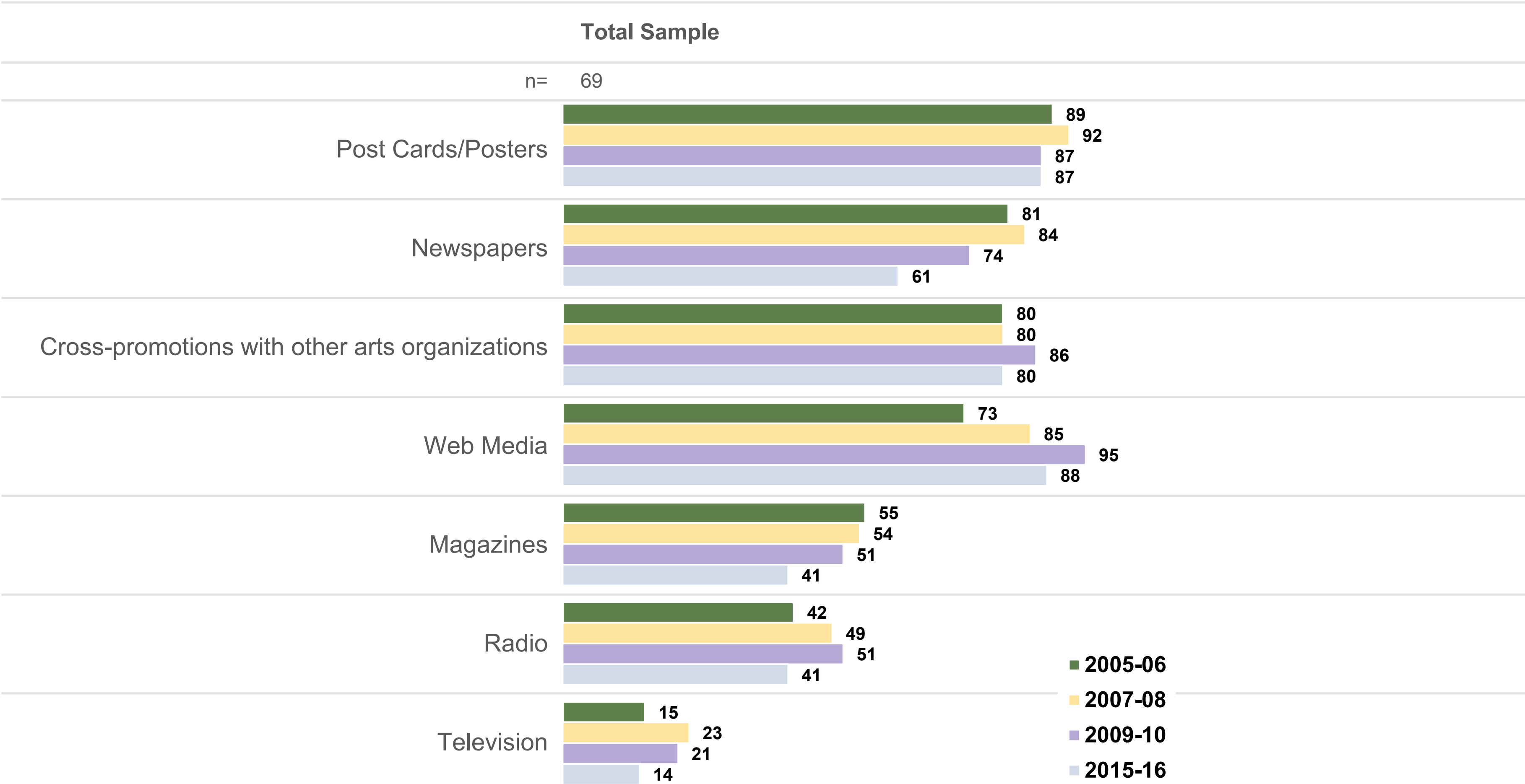
- Furthermore, most TAPA members responding to the survey, report their extensive use of social media for advertising, with Facebook being near universally used and Twitter by over 8-in-10. About half also report using Instagram. Many report well over 500 followers.

- In terms of how the marketing budget is allocated, no one channel dominates with: posters/postcards, print newspapers/magazines, online, social media and the website all taking 10% or more of the budget.

- However, in terms of what is assessed as delivering value for money, this varies greatly. Social media, online generally and brochures are all judged highly as providing the best value and print newspapers/magazines the lowest assessed value for money. In fact, only 3% of members feel that advertising in newspapers or magazines provides ‘excellent’ value for money.

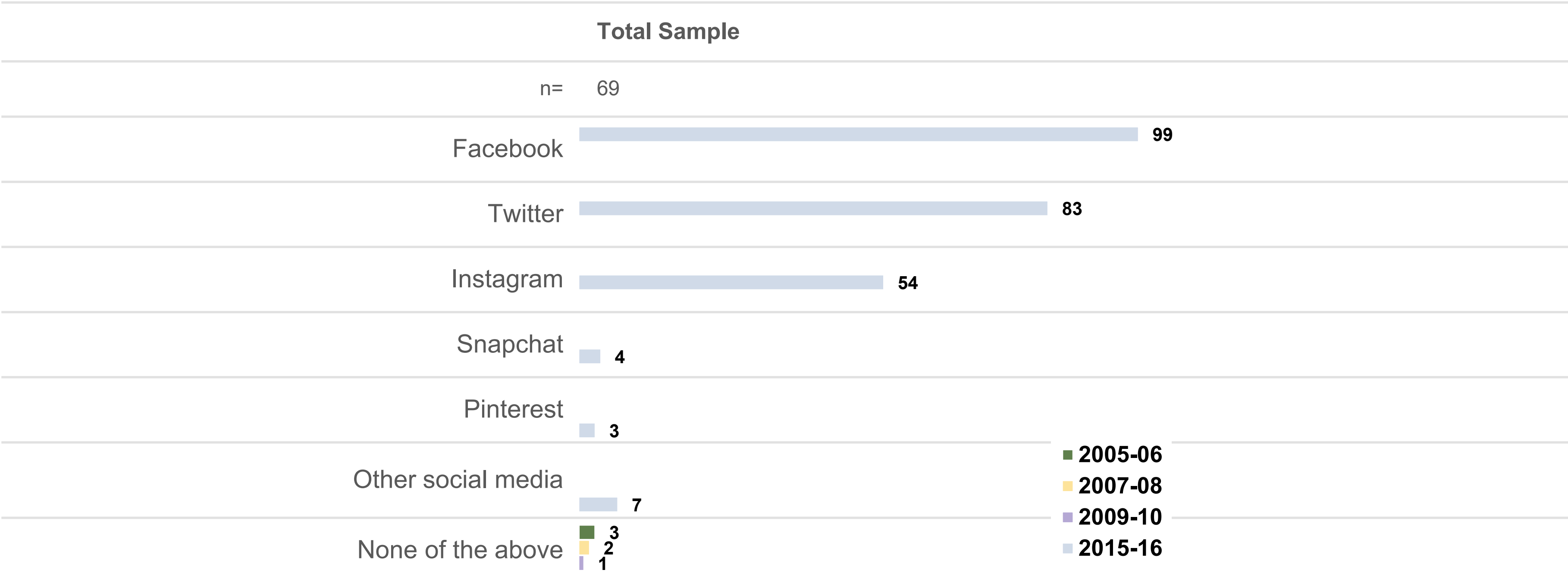
- Roughly seven-in-ten (68%) organizations participate in cross-promotional partnerships with local businesses, but down from 78% in 2009/10.

TAPA Member Advertising Mediums



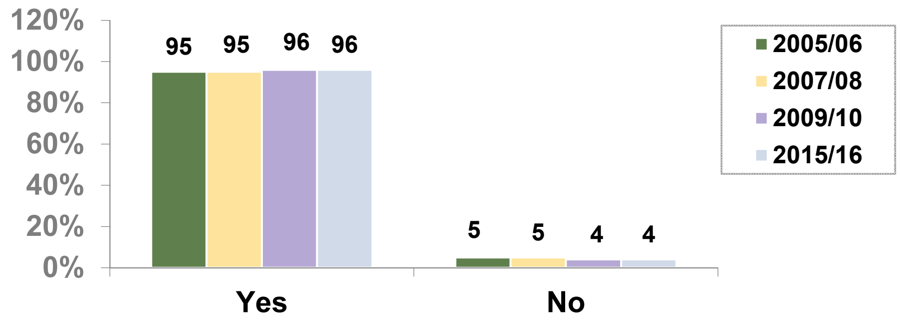
Q.44 Which of the following mediums, if any, have you used to advertise in the past year?
Base: Total respondents (n=69)

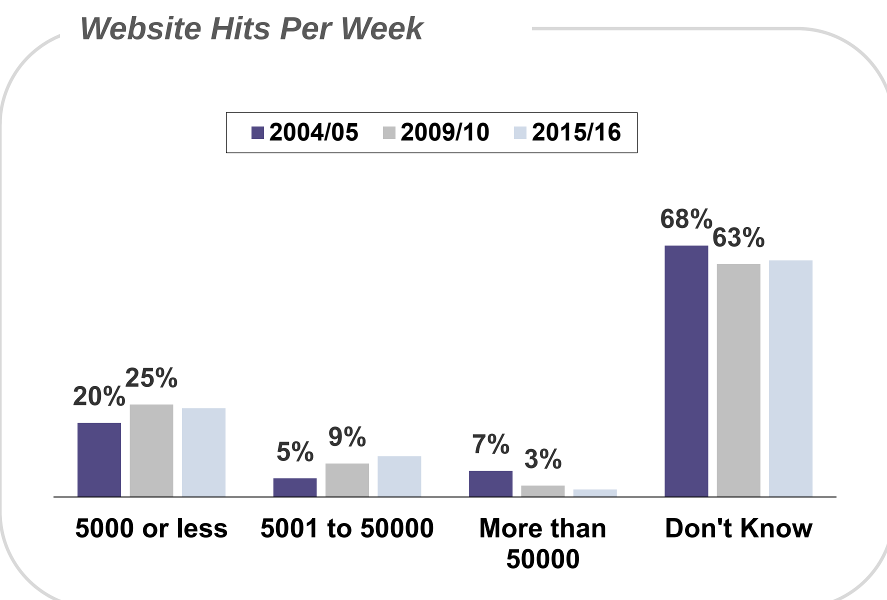
TAPA Member Advertising Mediums (cont'd)

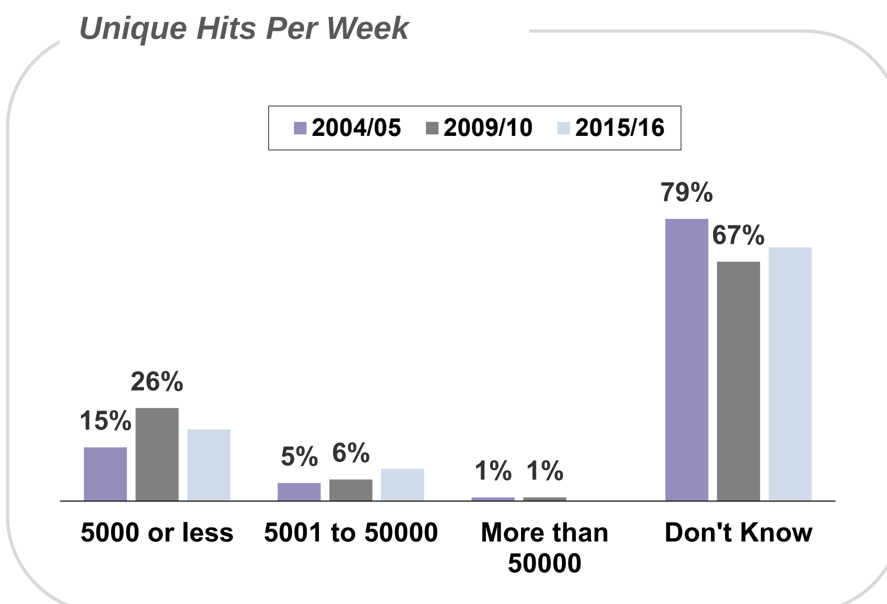


Q.44 Which of the following mediums, if any, have you used to advertise in the past year?
Base: Total respondents (n=69)

Website Use



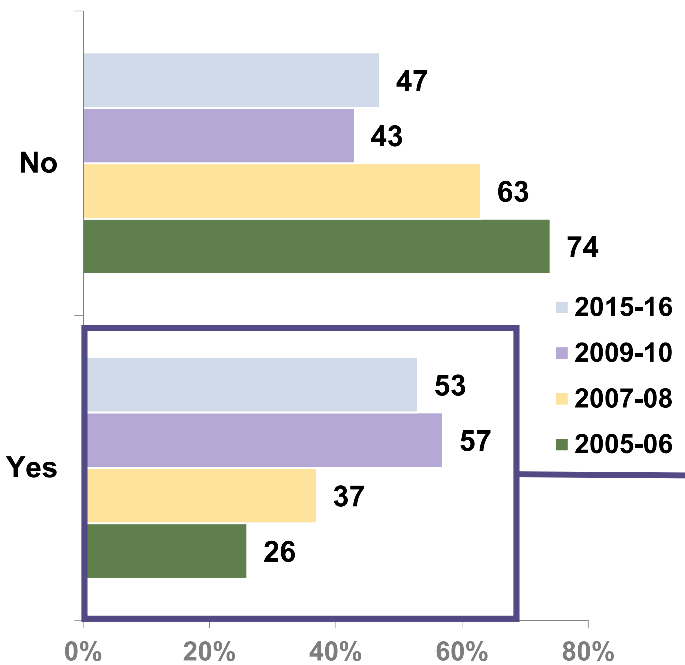




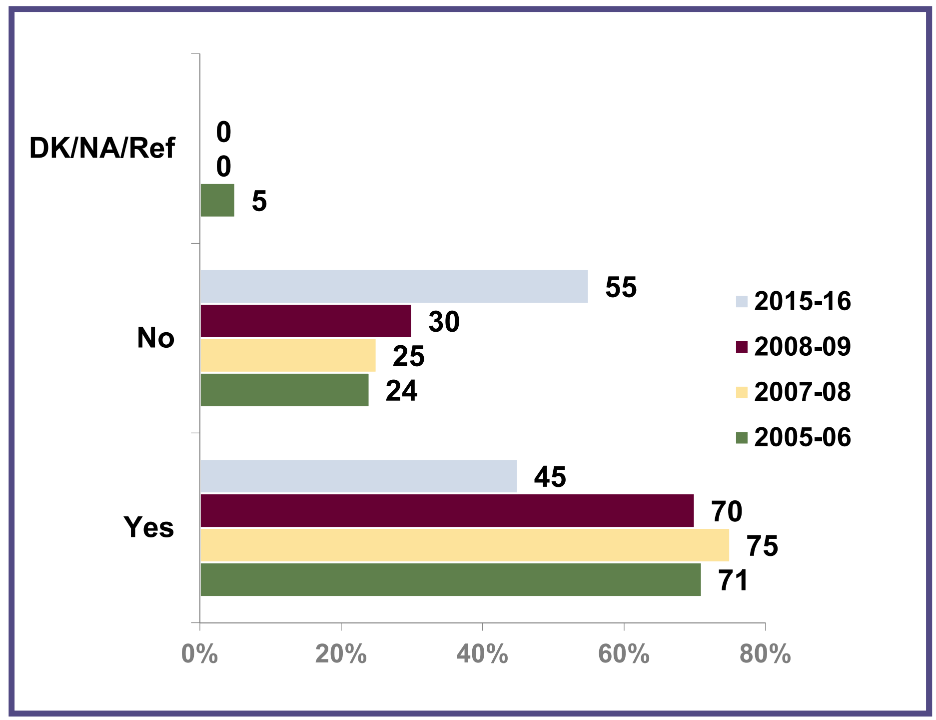
Q.48 Does your organization have its own website?
Base: Total respondents (n=69)
Q.49 In an average week, how many hits does your website receive?
Q.50 And how many unique visitors does your organization's website receive in an average week? A unique visitor is a visitor who is counted only once despite the number of times they access your organization's website.
Base: Those organizations that have a website (n=66)

Website Use for Selling Tickets Among TAPA Members

Ability to Sell Tickets Online



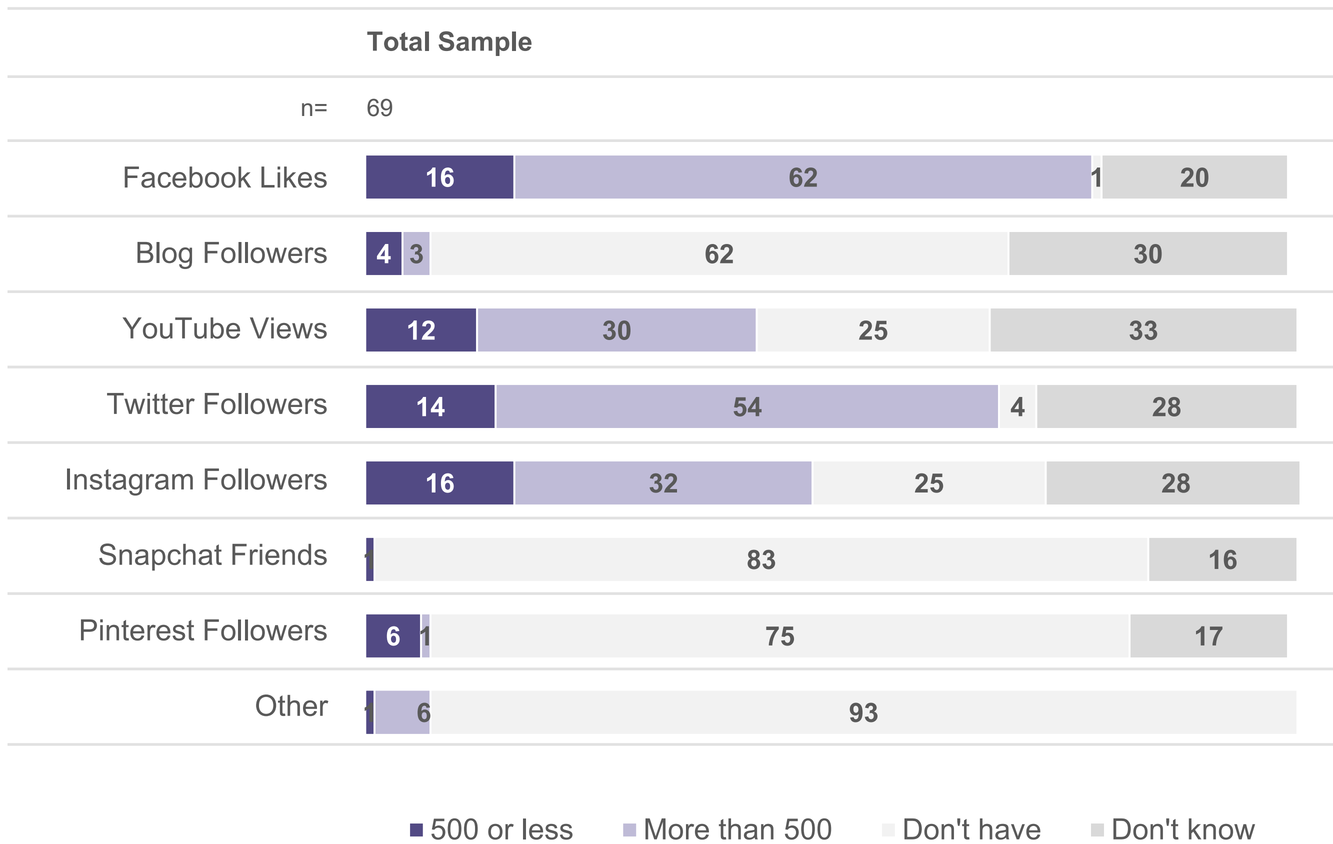
Ability to Sell Tickets in Real Time Directly from Inventory



Q.51 Do you sell single tickets or subscriptions for your productions on your website?
Base: Those organizations that have a website (n=66)
Q.52 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=66)

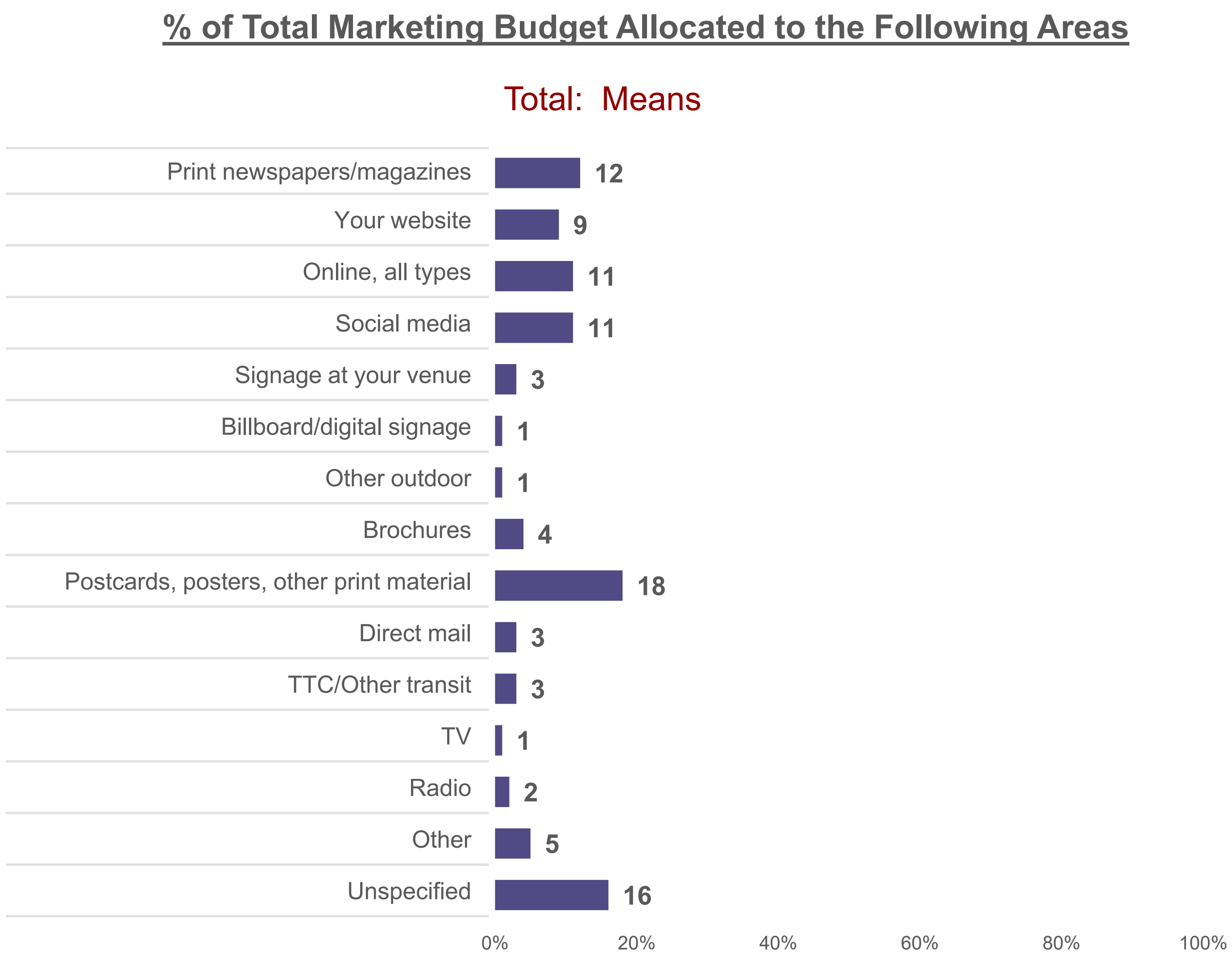
Likes, Followers and Views on Various Social Media Channels

Likes/Followers/Views Organization has on Social Media Channels



Q.45 How many likes/followers/views does your organization have when it comes to each of the following social media channels?
Base: Total respondents (n=69)

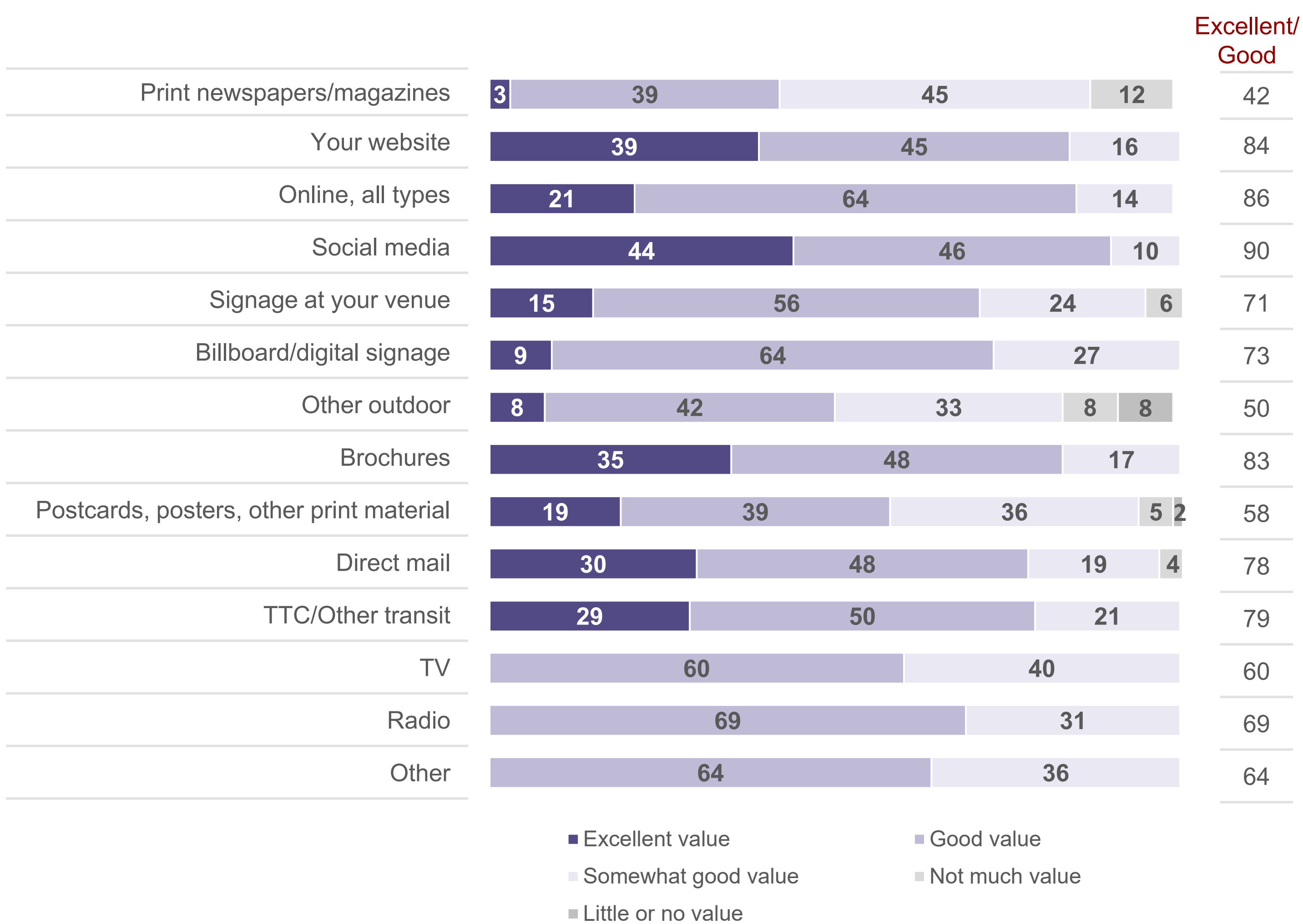
Breakdown of Marketing Budget



Q.46 What percentage, of your total marketing budget is allocated to the following areas?
Base: Total respondents (n=69)

Marketing Channels Value for Money

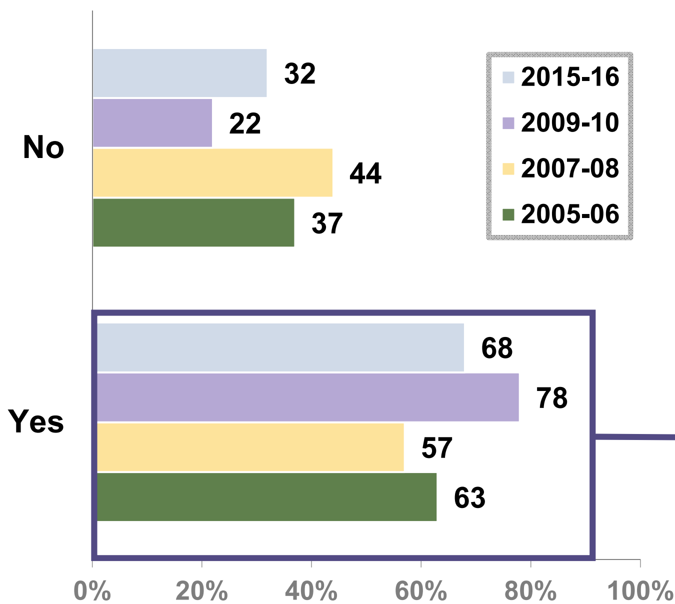
Value for the Money Spent Each Marketing Area Provides



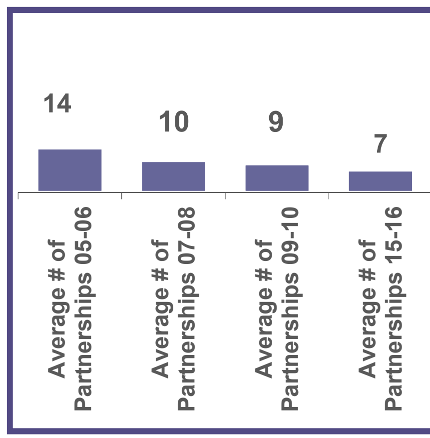
Q.47 For each of the marketing areas cited, what value for the money spent do they provide?
Base: Total respondents (bases vary)

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	15-16
n=	54	52	61	47
	%	%	%	%
Other theatres	69	56	74	79
Restaurant	52	67	56	64
Other live performance venue	39	33	43	34
Local charity	33	31	23	17
Tourism Toronto	25	31	20	15
Museum/(added in 2015/16) Art galleries	13	25	18	26
Parking lot	4	6	5	2
Media	-	-	-	45
Other	50	39	74	30

Q.50b Does your organization participate in any partnerships or cross-promotions with other local businesses?
Base: Total respondents (n=69)
Q.51b With how many businesses does your organization currently have an existing partnership or cross-promotion?
Q.52b 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=47)

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

14 TOURING

Touring

- Six-in-ten (61%) companies toured in both 2014/15 and 2015/16 seasons.
- Significantly, the number of tours undertaken, the average number of tours (among those who toured), the number of venues performed and the average number of venues performed in while on tour, was down across the board was down in last two seasons (2014/15 and 2015/16) compared to previous years.
- The most important source of funding/financing for touring comes from performance fees (47% in 2015/16). Other important sources include ticket sales (14%) and the Federal Government (13%).

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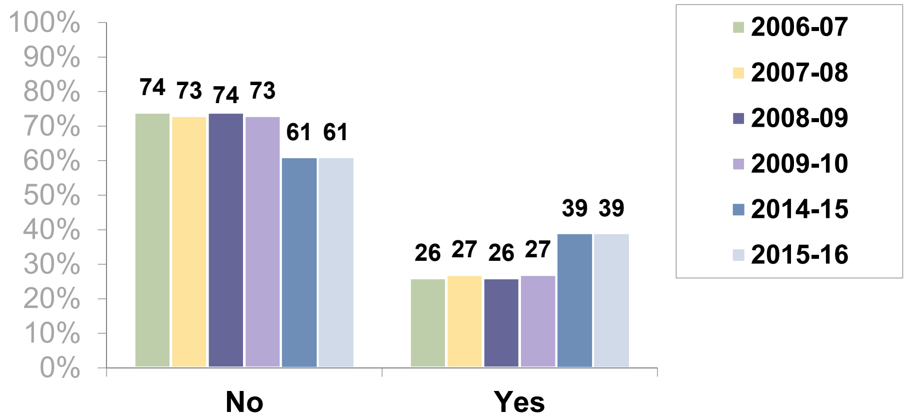
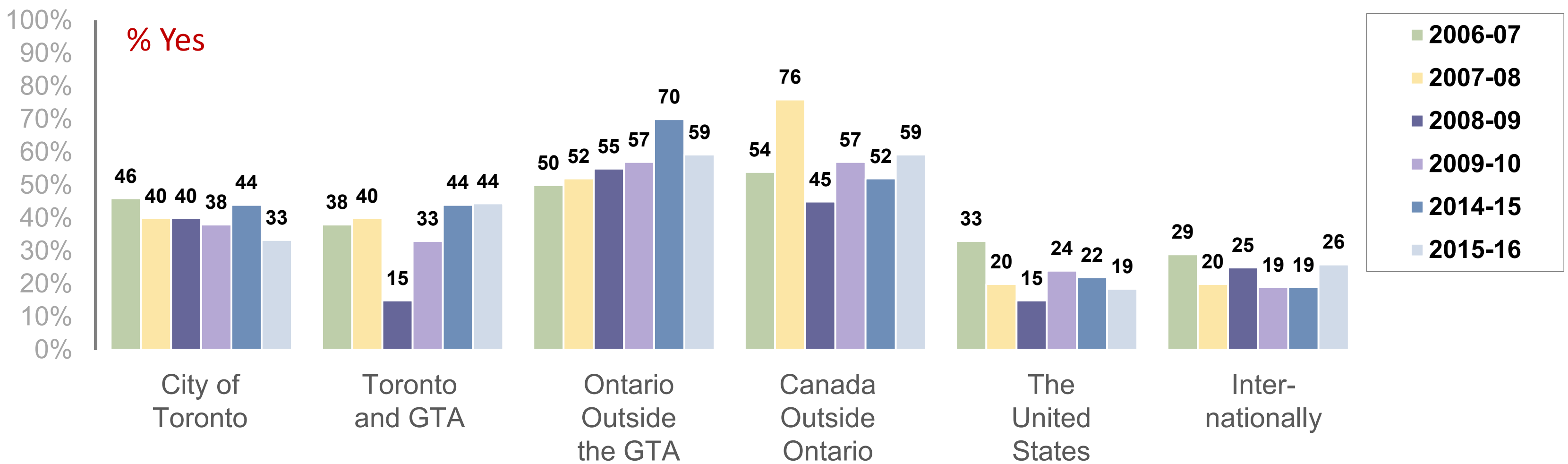
Touring





Q.39 Did your company tour at all in 2014-2015 and 2015-2016?
Base: Total respondents (n=69)
Q.40 Where did you tour?
Base: TAPA members who companies toured in 2007-08 (n=21) and 2008-09 (n=22), 2014-15 (n=27), 2015-16 (n=27)

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Number of Tours and Venues

% Yes

Number of Tours						Number of Venues performed in while on tour					
2006-07	2007-08	2008-09	2009-10	2014-15	2015-16	2006-07	2007-08	2008-09	2009-10	2014-15	2015-16
57	54	86	85	54	54	479	474	458	358	224	241
Average Number of Tours (among those who toured)						**Average # of Venues performed in while on tour**					
2006-07	2007-08	2008-09	2009-10	2014-15	2015-16	2006-07	2007-08	2008-09	2009-10	2014-15	2015-16
2	2	4	4	2	2	20	19	23	17	8	9

Q.41 How many tours did you make in each year?
Q.42 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), 2014-15 (n=27), 2015-16 (n=27)

Sources used to Finance Touring

What percentage of the total cost of touring came from the following sources?	2006-07	2007-08	2008-09	2009-10	2014-15	2015-16
n=	24	25	21	22	27	27
	Average %	Average %	Average %	Average %	Average %	Average %
Ticket Sales	28	17	36	35	15	14
Guaranteed Fees / Presenter Fees / Performance Fees	27	24	N/A	N/A	55	47
Federal Government	8	12	20	10	6	13
Provincial Government	11	10	8	8	4	8
City	2	3	2	1	1	2
Foundations	3	4	8	7	3	3
Fundraising	7	9	13	12	12	5
Other	51	46	47	49	5	8

Q.43 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), 2014-15 (n=27), 2015-16 (n=27)

15

LOOKING AHEAD

Looking Ahead

- When respondents were asked to think ahead to the next three to five years and describe their future, roughly three-quarters (between 75% and 78% across each of the sample phases) said either 'somewhat' or 'very' positive. Furthermore, and encouragingly compared with previous phases, a large 45% up from 28% in 2009/10 say they are "very" positive about the future.

- The biggest challenges they are likely to face in the next three to five years relate to declining ticket sales and audiences, questions about funding (incl. government funding), fundraising issues and staffing issues.

Looking Forward

How would you best describe the company's views about the future?	Total Sample Phase II	Total Sample Phase III	Total Sample Phase IV
n=	92	80	69
	%	%	%
NET Positive	**78**	**78**	**75**
Very Positive	38	28	45
Somewhat Positive	40	50	30
Uncertain	19	21	23
Somewhat Negative	1	1	1
Very Negative	2	-	-
NET Negative	**3**	**1**	1

Q.55 Thinking ahead to the next three to five years, how would you best describe the company's views about the future? (previous phrasing) Thinking ahead the next year or two, how would you best describe the company's view about the future?
Base: Total respondents (n=69)

Looking Forward (cont'd)

Top three challenges	Total Sample Phase II	Total Sample Phase III	Total Sample Phase IV
n=	92	80	69
	%	%	%
Ticket Sales/Filling Audience/Declining Tourism	62	47	38
Money/funds/finances/budget/operating expenses (general)	45	36	36
Staffing Issues	37	27	32
Private Fundraising	36	27	7
Receiving Government Funds/Funding	34	39	42
Declining Economy (General)	20	6	3
Need new/better/larger venue/Venue issues	20	30	16
Marketing/Promotion	-	13	26
Creative issues/scripts/acts/programming	-	10	9
Other/DK/Ref	40	30	29

Q.56 What are the three biggest challenges the company faces over the three to five years? (previous phrasing) What are the three biggest challenges the company faces over the next year or two?
Base: Total respondents (n=xx)