



SNAPSHOT SURVEY: TAKING YOUR FISCAL PULSE

While TCG's annual Fiscal Survey provides an unparalleled in-depth look at the fiscal health of the field, many member theatres have expressed a wish for an up-to-the-minute sense of how everyone is doing. Conducted in early Fall 2008, TCG's Snapshot Survey: *Taking Your Fiscal Pulse* reports the vital signs of 241 TCG member theatres at the close of their most recent fiscal year.

Annual Expenses	Budget Group
\$50,000 - \$499,999	Budget Group 1
\$500,000 - \$999,999	Budget Group 2
\$1,000,000 - \$2,999,999	Budget Group 3
\$3,000,000 - \$4,999,999	Budget Group 4
\$5,000,000 - \$9,999,999	Budget Group 5
\$10,000,000 and above	Budget Group 6

In your most recently-ended season (or the season that is just about to end), was the number of SUBSCRIBERS:

	All Theatres	Budget Group 1	Budget Group 2	Budget Group 3	Budget Group 4	Budget Group 5	Budget Group 6
Number of Theatres	241	56	50	67	26	22	20
Up from the previous season	38.6%	35.7%	42.0%	41.8%	34.6%	31.8%	40.0%
Same as or similar to the previous season	13.7%	10.7%	14.0%	10.4%	23.1%	18.2%	15.0%
Down from the previous season	25.7%	12.5%	16.0%	31.3%	30.8%	50.0%	35.0%
We do not have subscribers	22.0%	41.1%	28.0%	16.4%	11.5%	0.0%	10.0%

As you head into next season, is the number of SUBSCRIBERS:

	All Theatres	Budget Group 1	Budget Group 2	Budget Group 3	Budget Group 4	Budget Group 5	Budget Group 6
Number of Theatres	241	56	50	67	26	22	20
Up from the previous season	24.9%	16.1%	26.0%	28.4%	38.5%	22.7%	20.0%
Same as or similar to the previous season	31.1%	19.6%	34.0%	38.8%	34.6%	31.8%	25.0%
Down from the previous season	22.0%	19.6%	14.0%	17.9%	15.4%	45.5%	45.0%
We do not have subscribers	22.0%	44.6%	26.0%	14.9%	11.5%	0.0%	10.0%

In your most recently-ended season (or the season that is just about to end), was the number of SINGLE TICKET BUYERS:

	All Theatres	Budget Group 1	Budget Group 2	Budget Group 3	Budget Group 4	Budget Group 5	Budget Group 6
Number of Theatres	241	56	50	67	26	22	20
Up from the previous season	52.7%	51.8%	52.0%	55.2%	34.6%	50.0%	75.0%
Same as or similar to the previous season	17.8%	19.6%	22.0%	14.9%	34.6%	9.1%	0.0%
Down from the previous season	29.5%	28.6%	26.0%	29.9%	30.8%	40.9%	25.0%

Did your organization experience any of the following significant changes last year as compared to the previous year? (Check any that apply)

	All Theatres	Budget Group 1	Budget Group 2	Budget Group 3	Budget Group 4	Budget Group 5	Budget Group 6
Number of Theatres	241	56	50	67	26	22	20
Leadership transition	41.6%	28.0%	40.5%	47.3%	47.1%	57.9%	42.9%
Building/Equipment acquisition or renovation	28.4%	18.0%	33.3%	34.5%	35.3%	26.3%	21.4%
Staff expansion	44.7%	54.0%	50.0%	41.8%	58.8%	21.1%	21.4%
Staff reduction	17.8%	20.0%	14.3%	23.6%	23.5%	10.5%	0.0%
Staff furloughs	2.5%	2.0%	4.8%	1.8%	5.9%	0.0%	0.0%
Expanded Season (productions and/or performances)	40.1%	44.0%	35.7%	45.5%	23.5%	42.1%	35.7%
Reduced Season (productions and/or performances)	9.6%	14.0%	11.9%	9.1%	0.0%	10.5%	0.0%
Community event or natural disaster that may have affected ticket sales	9.1%	10.0%	14.3%	9.1%	11.8%	0.0%	0.0%
Other*	13.2%	8.0%	7.1%	12.7%	23.5%	15.8%	35.7%

* Other significant changes cited included: substantial increase in fundraising efforts, launch of capital campaign, commercial productions, "commercially-minded" programming, staff turnover, refocusing of mission, board expansion, competition from nearby theatres, change of Equity contracts, loss of endowment, lack of extension weeks.

Did you end fiscal year '08 (or do you anticipate ending fiscal year '08, if your season is about to end) with an operating surplus or deficit?

	All Theatres	Budget Group 1	Budget Group 2	Budget Group 3	Budget Group 4	Budget Group 5	Budget Group 6
Number of Theatres	241	56	50	67	26	22	20
Operating Surplus	41.5%	32.1%	50.0%	40.3%	34.6%	54.5%	45.0%
Break-even	22.0%	28.6%	18.0%	22.4%	23.1%	13.6%	20.0%
Operating Deficit	36.5%	39.3%	32.0%	37.3%	42.3%	31.8%	35.0%

Which sources of contributed income are trending in ways that are causing you the MOST concern for your organization? Chart reflects sources selected as 5 and 6 on a scale of 1 (least concerning) to 6 (most concerning).

	All Theatres	Budget Group 1	Budget Group 2	Budget Group 3	Budget Group 4	Budget Group 5	Budget Group 6
Number of Theatres	241	56	50	67	26	22	20
Federal	15.0%	21.0%	16.0%	11.0%	19.0%	10.0%	5.0%
Regional/Local	30.0%	31.0%	30.0%	35.0%	23.0%	32.0%	10.0%
Corporate	59.0%	41.0%	58.0%	59.0%	69.0%	86.0%	70.0%
Foundation	34.0%	35.0%	32.0%	31.0%	38.0%	27.0%	40.0%
Trustee	17.0%	25.0%	12.0%	14.0%	16.0%	10.0%	20.0%
Other Individuals	46.0%	46.0%	52.0%	46.0%	34.0%	36.0%	55.0%

Did you experience any major cash flow problems in the last year?							
	All Theatres	Budget Group 1	Budget Group 2	Budget Group 3	Budget Group 4	Budget Group 5	Budget Group 6
Number of Theatres	241	56	50	67	26	22	20
Yes	44.4%	55.4%	40.0%	47.8%	46.2%	40.9%	15.0%
No	55.6%	44.6%	60.0%	52.2%	53.8%	59.1%	85.0%

Did you lose any sleep thinking about: (check all that apply)							
	All Theatres	Budget Group 1	Budget Group 2	Budget Group 3	Budget Group 4	Budget Group 5	Budget Group 6
Number of Theatres	241	56	50	67	26	22	20
Gas prices	29.4%	30.2%	23.9%	36.9%	16.0%	31.8%	30.0%
Cash flow	59.3%	71.7%	60.9%	63.1%	52.0%	54.5%	25.0%
Personnel issues (i.e. staffing, benefits, etc.)	69.3%	67.9%	65.2%	75.4%	64.0%	77.3%	60.0%
Board dynamics	45.5%	58.5%	37.0%	50.8%	44.0%	31.8%	30.0%
The economy	66.7%	60.4%	60.9%	66.2%	80.0%	63.6%	85.0%
Workload	69.3%	81.1%	76.1%	69.2%	44.0%	68.2%	55.0%
Ticket Sales	62.8%	58.5%	63.0%	61.5%	52.0%	86.4%	65.0%
Other *	15.2%	17.0%	15.2%	7.7%	28.0%	9.1%	25.0%

* Other causes of sleepless nights included: facility issues, capital campaigns (especially in this economy), long-term sustainability (for individual theatres and the field as a whole), endowment earnings (or lack thereof), subscription sales, staff burnout, staff turnover, staff salaries, fundraising/contributions, cost of heating, area crime rates that deter audiences, programming, cost of artist housing and transportation, conveying mission to a product-oriented market, what is going to happen in the next year and how will we handle it?

How many sleepless nights did you have over cash problems, real or imagined?							
	All Theatres	Budget Group 1	Budget Group 2	Budget Group 3	Budget Group 4	Budget Group 5	Budget Group 6
Number of Theatres	241	56	50	67	26	22	20
0 (I can sleep through anything)	23.2%	16.1%	24.0%	17.9%	30.8%	27.3%	45.0%
1 - 5	29.9%	30.4%	38.0%	29.9%	19.2%	31.8%	20.0%
5 - 10	19.5%	23.2%	10.0%	17.9%	30.8%	22.7%	20.0%
10 - 25	17.4%	17.9%	24.0%	20.9%	7.7%	13.6%	5.0%
over 25	10.0%	12.5%	4.0%	13.4%	11.5%	4.5%	10.0%