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.

<table>
<thead>
<tr>
<th>Annual Expenses</th>
<th>Budget Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>$50,000 - $499,999</td>
<td>Budget Group 1</td>
</tr>
<tr>
<td>$500,000 - $999,999</td>
<td>Budget Group 2</td>
</tr>
<tr>
<td>$1,000,000 - $2,999,999</td>
<td>Budget Group 3</td>
</tr>
<tr>
<td>$3,000,000 - $4,999,999</td>
<td>Budget Group 4</td>
</tr>
<tr>
<td>$5,000,000 - $9,999,999</td>
<td>Budget Group 5</td>
</tr>
<tr>
<td>$10,000,000 and above</td>
<td>Budget Group 6</td>
</tr>
</tbody>
</table>

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

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

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

<table>
<thead>
<tr>
<th>Number of Theatres</th>
<th>All Theatres</th>
<th>Budget Group 1</th>
<th>Budget Group 2</th>
<th>Budget Group 3</th>
<th>Budget Group 4</th>
<th>Budget Group 5</th>
<th>Budget Group 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Theatres</td>
<td>241</td>
<td>56</td>
<td>50</td>
<td>67</td>
<td>26</td>
<td>22</td>
<td>20</td>
</tr>
<tr>
<td>Up from the previous season</td>
<td>24.9%</td>
<td>16.1%</td>
<td>26.0%</td>
<td>28.4%</td>
<td>38.5%</td>
<td>22.7%</td>
<td>20.0%</td>
</tr>
<tr>
<td>Same as or similar to the previous season</td>
<td>31.1%</td>
<td>19.6%</td>
<td>34.0%</td>
<td>38.8%</td>
<td>34.6%</td>
<td>31.8%</td>
<td>25.0%</td>
</tr>
<tr>
<td>Down from the previous season</td>
<td>22.0%</td>
<td>19.6%</td>
<td>14.0%</td>
<td>17.9%</td>
<td>15.4%</td>
<td>45.5%</td>
<td>45.0%</td>
</tr>
<tr>
<td>We do not have subscribers</td>
<td>22.0%</td>
<td>44.6%</td>
<td>26.0%</td>
<td>14.9%</td>
<td>11.5%</td>
<td>0.0%</td>
<td>10.0%</td>
</tr>
</tbody>
</table>
In your most recently-ended season (or the season that is just about to end), was the number of SINGLE TICKET BUYERS:

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

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

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

*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?

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

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).

<table>
<thead>
<tr>
<th></th>
<th>All Theatres</th>
<th>Budget Group 1</th>
<th>Budget Group 2</th>
<th>Budget Group 3</th>
<th>Budget Group 4</th>
<th>Budget Group 5</th>
<th>Budget Group 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Theatres</td>
<td>241</td>
<td>56</td>
<td>50</td>
<td>67</td>
<td>26</td>
<td>22</td>
<td>20</td>
</tr>
<tr>
<td>Federal</td>
<td>15.0%</td>
<td>21.0%</td>
<td>16.0%</td>
<td>11.0%</td>
<td>19.0%</td>
<td>10.0%</td>
<td>5.0%</td>
</tr>
<tr>
<td>Regional/Local</td>
<td>30.0%</td>
<td>31.0%</td>
<td>30.0%</td>
<td>35.0%</td>
<td>23.0%</td>
<td>32.0%</td>
<td>10.0%</td>
</tr>
<tr>
<td>Corporate</td>
<td>59.0%</td>
<td>41.0%</td>
<td>58.0%</td>
<td>59.0%</td>
<td>69.0%</td>
<td>86.0%</td>
<td>70.0%</td>
</tr>
<tr>
<td>Foundation</td>
<td>34.0%</td>
<td>35.0%</td>
<td>32.0%</td>
<td>31.0%</td>
<td>38.0%</td>
<td>27.0%</td>
<td>40.0%</td>
</tr>
<tr>
<td>Trustee</td>
<td>17.0%</td>
<td>25.0%</td>
<td>12.0%</td>
<td>14.0%</td>
<td>16.0%</td>
<td>10.0%</td>
<td>20.0%</td>
</tr>
<tr>
<td>Other Individuals</td>
<td>46.0%</td>
<td>46.0%</td>
<td>52.0%</td>
<td>46.0%</td>
<td>34.0%</td>
<td>36.0%</td>
<td>55.0%</td>
</tr>
</tbody>
</table>
## Did you experience any major cash flow problems in the last year?

<table>
<thead>
<tr>
<th>Number of Theatres</th>
<th>All Theatres</th>
<th>Budget Group 1</th>
<th>Budget Group 2</th>
<th>Budget Group 3</th>
<th>Budget Group 4</th>
<th>Budget Group 5</th>
<th>Budget Group 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>241</td>
<td>56</td>
<td>50</td>
<td>67</td>
<td>26</td>
<td>22</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>44.4%</td>
<td>55.4%</td>
<td>40.0%</td>
<td>47.8%</td>
<td>46.2%</td>
<td>40.9%</td>
<td>15.0%</td>
</tr>
<tr>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>55.6%</td>
<td>44.6%</td>
<td>60.0%</td>
<td>52.2%</td>
<td>53.8%</td>
<td>59.1%</td>
<td>85.0%</td>
</tr>
</tbody>
</table>

## Did you lose any sleep thinking about: (check all that apply)

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

* 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?

<table>
<thead>
<tr>
<th>Number of Theatres</th>
<th>All Theatres</th>
<th>Budget Group 1</th>
<th>Budget Group 2</th>
<th>Budget Group 3</th>
<th>Budget Group 4</th>
<th>Budget Group 5</th>
<th>Budget Group 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 (I can sleep through anything)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>241</td>
<td>56</td>
<td>50</td>
<td>67</td>
<td>26</td>
<td>22</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>23.2%</td>
<td>16.1%</td>
<td>24.0%</td>
<td>17.9%</td>
<td>30.8%</td>
<td>27.3%</td>
<td>45.0%</td>
</tr>
<tr>
<td>1 - 5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>241</td>
<td>56</td>
<td>50</td>
<td>67</td>
<td>26</td>
<td>22</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>29.9%</td>
<td>30.4%</td>
<td>38.0%</td>
<td>29.9%</td>
<td>19.2%</td>
<td>31.8%</td>
<td>20.0%</td>
</tr>
<tr>
<td>5 - 10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>241</td>
<td>56</td>
<td>50</td>
<td>67</td>
<td>26</td>
<td>22</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>19.5%</td>
<td>23.2%</td>
<td>10.0%</td>
<td>17.9%</td>
<td>30.8%</td>
<td>22.7%</td>
<td>20.0%</td>
</tr>
<tr>
<td>10 - 25</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>241</td>
<td>56</td>
<td>50</td>
<td>67</td>
<td>26</td>
<td>22</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>17.4%</td>
<td>17.9%</td>
<td>24.0%</td>
<td>20.9%</td>
<td>7.7%</td>
<td>13.6%</td>
<td>5.0%</td>
</tr>
<tr>
<td>over 25</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>241</td>
<td>56</td>
<td>50</td>
<td>67</td>
<td>26</td>
<td>22</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>10.0%</td>
<td>12.5%</td>
<td>4.0%</td>
<td>13.4%</td>
<td>11.5%</td>
<td>4.5%</td>
<td>10.0%</td>
</tr>
</tbody>
</table>