

Modern theater in the U.S. requires collaboration among many artists, craftspeople and managers in order to create a performance. In many cases, theater groups are generally operated as for profit ventures. However, nonprofit theater groups, such as community or outdoor theaters, tend to also attract a significant amount of audiences and activities.

The National Endowment for the Arts (NEA) recently reported on the growth, distribution, and finances of United States non-profit theaters during the fifteen year span from 1990-2005 “While the research indicates broad growth and generally positive fiscal health, it also reveals decreasing attendance rates and vulnerability during economic downturns.” A summary of the findings follows below (NEA, 2008).

Growth and distribution

- The number of non-profit theaters in the United States doubled during the time period surveyed (1990-2005).
- The majority of non-profit theaters were in highly-populated states. In Texas alone during 2005, there were over 100 theaters.
- There was significant growth in the number of theaters in smaller and mid-size states. The states with the highest concentration of theaters per capita included Vermont, Alaska, Maine, Montana, Rhode Island, Oregon, Connecticut, New Hampshire, and Minnesota.

Finances

- Non-profit theaters’ assets outpaced their liabilities. In the fifteen year period

examined, assets, which were primarily fixed assets, grew by 60%.

- Theaters managed a good balance between earned and contributed income. In 2005, earned income represented 52% of all income. However, the rate of earned income had decreased 13% since 1990.
- Individuals and foundations were the most generous contributors to non-profit theaters in the United States.
- Funding from the National Endowment for the Arts appeared to be the catalyst which led to contributions from other places. “Each dollar in NEA grant support is associated with an additional \$12 from individual donors, \$1.88 from businesses, and \$3.55 from foundations” (NEA, 2008, p.6).
- Non-profit theaters’ finances mimicked the U.S. business cycle fluctuations from 1990-2005.
- Attendance at non-profit theater performances stayed the same or declined from 1990-2005.
- The rate of audience attendance at non-profit theater was not found to be correlated to the price of the tickets. (NEA, 2008)

CURRENT STATE OF NON-PROFIT THEATER

The Theatre Communications Group (TCG), founded in 1961 as the national organization for theater in the United States, reports each year on attendance, performance, and the fiscal health of its member non-profit theaters. The TCG reported that in 2014, non-profit

theaters brought more than \$2 billion to the United States economy through payments for goods and services (Voss, Voss, Rose, & Baskin, n.d.).

The following tables provide a two year comparison of the industry averages, expenses, earned income, and contributed income for the 118 non-profit theaters that have taken part in the TCG survey for at least the previous five years:

| INDUSTRY AVERAGES FOR NON-PROFIT THEATERS | | |
|--|--------|--------|
| | 2013 | 2014 |
| Subscription Renewal Rate | 74 | 74 |
| Subscription Price (per ticket) | 35.02 | 36.42 |
| Single Ticket Price | 35.15 | 36.55 |
| # of Offered Ticket Packages | 6.2 | 5.6 |
| # of Subscribers/Season Ticket Holders | 6,398 | 6,343 |
| Total Subscription Tickets | 32,350 | 32,070 |
| Total Single Tickets | 49,282 | 48,898 |
| Number of Main Series Productions | 28,235 | 28,145 |
| # of Performance Weeks | 34.4 | 34.2 |
| # of Actor Employment Weeks | 581 | 572 |
| (Voss et al., n.d.) | | |

| DISTRIBUTION OF EXPENSES FOR U.S. NON-PROFIT THEATERS | | |
|--|-------------|-------------|
| | 2013 | 2014 |
| | % | % |
| Artistic Payroll | 18.2 | 18.3 |
| Administrative Payroll | 20.9 | 21.3 |
| Production Payroll | 14.9 | 15.2 |
| Total Payroll | 54.1 | 54.8 |
| General Artistic Non-Payroll | 4.2 | 3.7 |
| Royalties | 2.3 | 2.2 |
| Physical Production/Tech* | 7.6 | 7.2 |
| Development/Fundraising | 3.4 | 3.5 |
| Marketing/Customer Service/Concessions | 11.1 | 11.3 |
| Occupancy/Building/ Equipment/Maintenance | 8.6 | 8.6 |
| Depreciation | 5.3 | 5.2 |
| General Management/Operations | 3.6 | 3.5 |
| Total Expenses | 100 | 100 |
| *Trend skewed by 1 or 2 theatres' exceptional activity (Voss et al., n.d.) | | |

| SOURCES OF EARNED INCOME FOR U.S. NON-PROFIT THEATERS | | |
|--|-------------|-------------|
| | 2013 | 2014 |
| | % | % |
| Subscription | 15.7 | 15.3 |
| Single Ticket Income | 22.2 | 23.3 |
| Booked-in Events | 0.9 | 1.0 |
| Total Ticket Income | 38.8 | 39.6 |
| Tour Contracts/Presenting Fees* | 1.9 | 0.5 |
| Education/Outreach | 2.7 | 2.9 |
| Interest and Dividends | 0.3 | 0.4 |
| Endowment Earnings | 3.1 | 3.7 |
| Capital Gains/Losses* | 3.9 | 3.1 |
| Royalties | 0.4 | 0.4 |
| Concessions | 1.5 | 1.7 |
| Production Income | 1.7 | 1.6 |
| Advertising | 0.3 | 0.3 |
| Rentals* | 1.5 | 2.2 |
| Other | 3.3 | 2.8 |
| Total Earned Income | 59.3 | 59.0 |
| *Trend skewed by 1 or 2 theatres' exceptional activity (Voss et al., n.d.) | | |

| SOURCES OF CONTRIBUTED INCOME FOR U.S. NON-PROFIT THEATERS | | |
|--|-------------|-------------|
| | 2013 | 2014 |
| | % | % |
| Federal* | 0.4 | 0.4 |
| State* | 1.1 | 1.1 |
| City/County* | 1.7 | 1.8 |
| Corporations | 3.5 | 3.3 |
| Foundations* | 8.1 | 9.1 |
| Trustees* | 5.6 | 6.3 |
| Other Individuals | 12.4 | 12.3 |
| Fundraising Events/Guilds | 5.1 | 5.7 |
| United Arts Funds | 0.3 | 0.3 |
| In-kind Services | 2.1 | 2.1 |
| Other Contributions | 1.7 | 1.5 |
| Total Contributed Income | 42.0 | 43.9 |
| *Trend skewed by 1 or 2 theatres' exceptional activity (Voss et al., n.d.) | | |

In a snapshot survey of 210 not-for-profit theatre organizations on budget size, projections, attendance, income and expenses in 2014 conducted by TCG, "66% answered that their FY had ended similar to or better than budget, which could mean that a planned deficit was on target or less severe, or a planned surplus was on target of higher than

expected” (Rose, 2014, p.3). When asked about the overall state of their organizations, 51% felt that they were holding steady, 37% felt they were on an upswing and 10% felt their situation was getting worse (Rose, 2014).

PARTICIPATION IN THEATER

The National Endowment for the Arts (2015) conducted a survey of adult participation in various types of the arts. Among other art forms, this survey included statistics about theater, with a focus on musical plays and non-musical plays. In general, over the past decade, adult participation in all types of art, whether by attending, visiting, or reading, has decreased.

“In 2012, there were more attendances at musical plays—72.5 million—than at any other type of performing arts studied” (NEA, 2015, p.8).

| PERCENT OF ADULT POPULATION PARTICIPATING (attending, visiting, or reading) in Theater Arts | | | |
|---|-------|-------|-------|
| | 2002 | 2008 | 2012 |
| Musical Plays | 17.1% | 16.7% | 15.2% |
| Non-musical Plays | 12.3% | 9.4% | 8.3% |
| (NEA, 2015) | | | |

Other types of live performing arts events attended included:

- Outdoor performing arts festivals (20.8%)
 - Free music, theater, or dance of any kind (15.9%)
 - Classical music (8.8%)
 - Jazz (8.1%)
 - Dance other than ballet (5.6%)
 - Latin music (5.1%)
 - Ballet (2.7%)
 - Opera (2.1%)
- (NEA, 2015)

Musical plays

While participation in art in general has decreased, in 2012, people attended musical plays more frequently than any other art form surveyed and the average participant attended 2.2 musical plays.

**SNAPSHOT OF A MUSICAL ATTENDEE IN 2012
(% of all musical attendees)**

- Female (59.3%)
 - Educated (53.5% held a college or graduate degree)
 - White (80.4%)
 - Older (59.1% age 45 and over)
- (NEA, 2015)

Non-Musical plays

There was a significant decline in non-musical play attendance from 2002 to 2012. A smaller portion of whites, men and women, and highly educated adults went to non-musical plays in 2012. “Non-musical attendance also declined for 18- to 24-year-olds and 55- to 64-year-olds, while musical play attendance did not” (NEA, 2013, p.17).

**SNAPSHOT OF A PLAY ATTENDEE IN 2012
(% of all play attendees)**

- Female (57.9%)
 - Educated (56.7% held a college or graduate degree)
 - White (80.7%)
 - Older (59.4% age 45 and over)
- (NEA, 2015)

While specific attendance figures were not reported, the Theatre Communications Group *Taking Your Fiscal Pulse 2014* snapshot survey indicated that overall, of 140 theatres, “63% of respondents reported that subscription packages/ memberships sold were similar to or better than their original budget, 67% reported that the number of single tickets sold was similar to or better than their original budget” (Rose, 2014, p. 4).

The National Endowment for the Arts (2012) suggests a correlation between the number of organizations per capita in a state, percentage of state residents with a bachelor’s degree or higher, and the percentage of residents living below the poverty line. Texas has low performing arts and museum attendance compared to the rest of the country, but this may be because the number of museums per capita is 26 percent below the national average. Additionally, Texas is ranked below average in education attainment and above average in poverty.

TEXAS NON-PROFIT THEATERS

There are several government and non-profit organizations that support theater throughout the state of Texas.

Texas Commission on the Arts

The Texas Commission on the Arts is a state agency that has three primary functions: to award grants to non-profit arts organizations, to promote and market the arts throughout the state, and to provide expertise and support in community development, fundraising, marketing, facility management, grant writing, and leadership skills to organizations (Texas Commission on the Arts, 2012).

Texas Nonprofit Theatres

“Texas Nonprofit Theatres (TNT) was formed in 1971 to encourage programmatic and managerial excellence in the nonprofit community and professional theatres of Texas” (TNT, n.d.).

Some of the functions and services of TNT include:

- Networking and consulting services for non-profit theaters
- Assessments for funding needs
- Produces a statewide theater directory
- Facilitates a yearly theater conference and the biennial American association of community theatre festival
- Runs a summer internship program
- Publishes current and past theatre productions throughout the state
- Lists job openings on its website
- Holds a script lending library of over 2,000 scripts
- Serves as a liaison to Texas commission on the arts

TNT runs its operations in 4 ‘quads’ because of the large size of the state. All of the Kronkosky counties of interest are located in TNT’s Quad 3 – Central and South Texas. In 2006, there were approximately 200 members of TNT, but there have been over 500 non-profit theaters identified throughout Texas (TNT, n.d.).

San Antonio Theatre Coalition

This coalition’s focus is to “facilitate communication and cooperation among the many theatre organizations in and around San Antonio, Texas” (San Antonio Theatre Coalition [SATCO], 2015). It provides show listings, audition and workshop information. This group is run by volunteers.

Alamo Theater Arts Council

“The purpose of the Alamo Theatre Arts Council (ATAC) is to recognize and celebrate the work of San Antonio theatre artists; to generate visibility and excitement for locally produced theater; to stimulate and encourage the pursuit of excellence in artistic and production standards; and to educate audiences in discovering the riches of the thespian arts” (Alamo Theater Arts Council, n.d.).

THEATERS IN SAN ANTONIO AND ENVIRONS

The following is a list of non-profit theaters in the Kronkosky counties of interest:

San Antonio

Alamo Theatre Arts Council
 AtticRep
 Boerne Community Theatre
 Cameo Theatre
 Classic Theatre of San Antonio
 Guadalupe Cultural Arts Center
 Harlequin Dinner Theatre
 Jonathan Pennington Studios
 Josephine Theatre
 Jump-Start Performance Co.
 Klose/Seale Productions
 Lackland Performing Arts Group
 Las Casas Foundation
 McNay Art Museum
 Murder Mystery Texas, Inc.
 Northwest Vista College Drama Program
 Northwood Players and Jr. Players
 Our Lady of the Lake University Drama Dept.
 Overtime Theater
 Performing Arts San Antonio
 Primadonna Productions
 Renaissance Guild
 San Antonio College Theatre
 San Antonio Theatre Coalition
 Say Si
 SeaWorld San Antonio

Sheldon Vexler Main Stage & Children's Theatre
 St. Mary's University Theatre
 St. Philip's College Theatre
 Storybook Theatre
 The Company Theatre
 The Magik Theatre
 The Playhouse (Russell Hill Rogers and Cellar Theaters)
 The Southwest Association of Literary and
 Dramatic Artists, LLC (SWALDA)
 Trinity University Dept. of Human
 Communication and Theatre
 University of the Incarnate Word Theatre Arts
 UTSA Lyric Theatre
 Woodlawn Theatre, Inc.

Bulverde

Spotlight Theatre & Arts Group Etc., Inc.

New Braunfels

Brauntex Performing Arts Theater Association
 Circle Arts Theatre
 New Braunfels Theatre Company
 Storybook Theatre of Texas
 (SATCO, 2015; TNT, n.d.)

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