



Canada Council
for the Arts

Conseil des arts
du Canada



Understanding Canadian Arts Through CADAC Data:

A Portrait of 76 Francophone Theatre Organizations in Canada

Research, Evaluation and Performance Measurement Section

Bringing the arts to life
De l'art plein la vie

CADAC (Canadian Arts Data / Données sur les arts au Canada) is a web-based integrated financial and statistical system for Canadian arts organizations that apply for recurring funding. The system enables the Canada Council for the Arts and other public funders to collect and share financial and statistical data. CADAC currently collects data from 794 Canada Council-funded organizations across all artistic disciplines.

CADAC partners include the following provincial, territorial and municipal arts funders: the British Columbia Arts Council, the City of Vancouver, the Alberta Foundation for the Arts, the Edmonton Arts Council, the Saskatchewan Arts Board, the City of Saskatoon, the Manitoba Arts Council, the Ontario Arts Council, the Toronto Arts Council, the City of Toronto's Cultural Division, the City of Greater Sudbury, the City of Kingston Arts Fund, the New Brunswick Arts Development Branch / Department of Tourism, Heritage and Culture, the Newfoundland and Labrador Arts Council and the Canada Council for the Arts.

CADAC statistical data cover not only receptive participation by the public (such as performance attendance and number of performances attended) but also their active participation (including volunteering and involvement in community arts projects).

This report is part of a series using CADAC data produced by the Canada Council's Research, Evaluation, and Performance Measurement Section. The other reports in this series are: *Arts Facts using CADAC Data: 49 Media Arts Presenters in Canada*; *Arts Facts using CADAC Data: 45 Media Arts Production Centres in Canada*; *Arts Facts using CADAC Data: A Portrait of 78 Art Museums / Public Art Galleries*; *Arts Facts using CADAC Data: A Portrait of 75 Artist-run Centres*; *Arts Facts using CADAC Data: A Portrait of 18 Opera Organizations*; *Arts Facts using CADAC Data: A Portrait of 115 Anglophone Theatre Organizations*; and *The Visual Arts Landscape in Canada As Seen Through CADAC, 2011-12*.

CADAC methodology

- This report describes 76 Francophone theatre organizations (FTOs) that receive recurring funding from the Theatre Section of the Canada Council for the Arts. The data therefore do not cover all theatre organizations in Canada (see the appendix for a list of the organizations included in this report) because Canada Council-funded theatre organizations choose the official language in which they want to be assessed and only the organizations that chose French, regardless of their province, are included in this report.
- The data used to prepare this report were extracted in October 2018. Most of the data cover the period from 2010-11 to 2016-17 (historical data), i.e. the financial years for which the CADAC data are most accurate. In some cases, financial data projections for 2017-18 and 2018-19 have been included.
- CADAC financial data reflect the financial statements submitted by arts organizations and have consequently not been adjusted for inflation. For their part, the statistical data have not been validated and correspond to what appears in the organizations' reports, which may include double counting. Data have been removed in rare instances where the exceptional circumstances of one organization skewed the overall portrait of the group or where statistical data present unexplained trends over a period of time.
- For more information concerning calculation of the indicators presented in this report, please refer to the Notes section (page 25). For interpretation of the CADAC lines, please read the definitions sections of the CADAC financial and statistical forms available at: <http://www.thecadac.ca/cms/en/guides.html>.

The next phase of this type of CADAC data report consists of an investigation and validation process that will analyze and explain significant deviations from normal trends (e.g. attendance with variations higher than 20% over a period of time).

For the purposes of this report, 76 organizations with total revenue of under \$8.5M were classified into three categories:

- I. Organizations with total revenue under \$500K (34)

- II. Organizations with total revenue from \$500K- \$1M (27)
- III. Organizations with total revenue above \$1M (15)

Whenever deviations were significant with respect to overall trends, Francophone theatre organizations for adult audiences – FTOAs (63) were differentiated from Francophone theatre organizations for young audiences – FTOYs (13).

This portrait was produced by the Canada Council for the Arts in collaboration with the ArtExpert.ca team of Louise Poulin and Maude Bouchard, and André Courchesne, consultant.

1. Finances

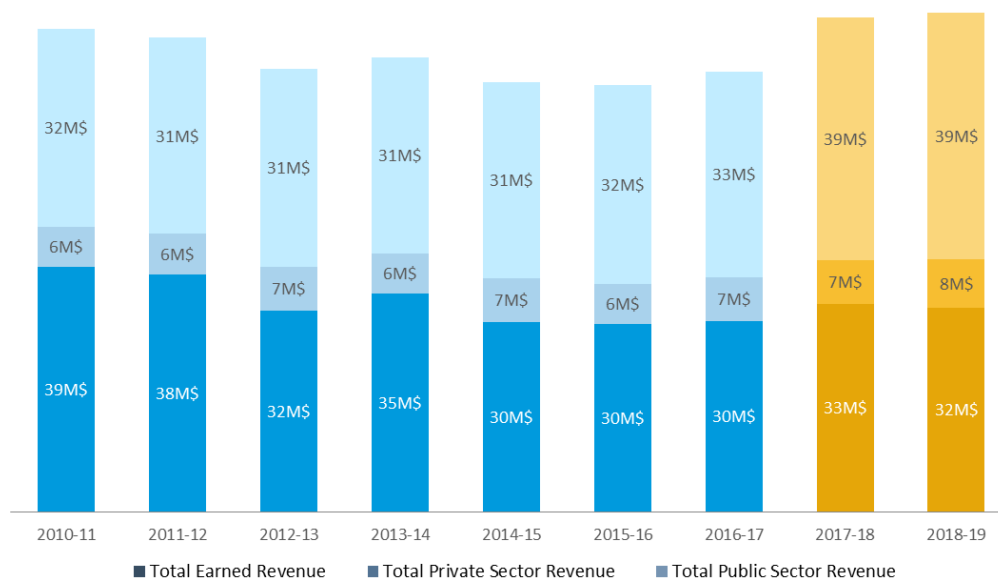
Funding model¹

Total revenue of the 76 Francophone theatre organizations (FTOs) fluctuated considerably between 2010-11 and 2014-15 due to significant variations in earned revenue or revenue from touring and co-production, as shown below.¹ However, since 2014-15 total revenue has been relatively stable with some growth over the past three financial years, namely, an increase in revenue of \$1.6M or 2.5% from \$68.8M in 2014-15 to \$70.5M in 2016-17.

In 2016-17, the public sector awarded \$32.7M in grants to 76 FTOs across Canada. During the same financial year, these organizations posted \$30.4M in earned revenue (43% of total revenue) and \$7M in financial support from the private sector (10% of total revenue). See Figure 1.²

The public sector contribution to operating budgets remained at practically the same level from 2010-11 to 2015-16, within a range from \$31.3M to \$31.6M. However, there was a more substantial increase in 2016-17 (+\$1.1M totalling \$32.7M). Since 2010-11, the growth in the public sector contribution was primarily due to increased funding from provincial agencies (+1.1M). The ratio of the public sector contribution to the organizations' overall revenue increased during the period from 41% in 2010-11 to 46.4% in 2016-17.

Figure 1: Revenue sources in \$M, actual and projected (n=76)

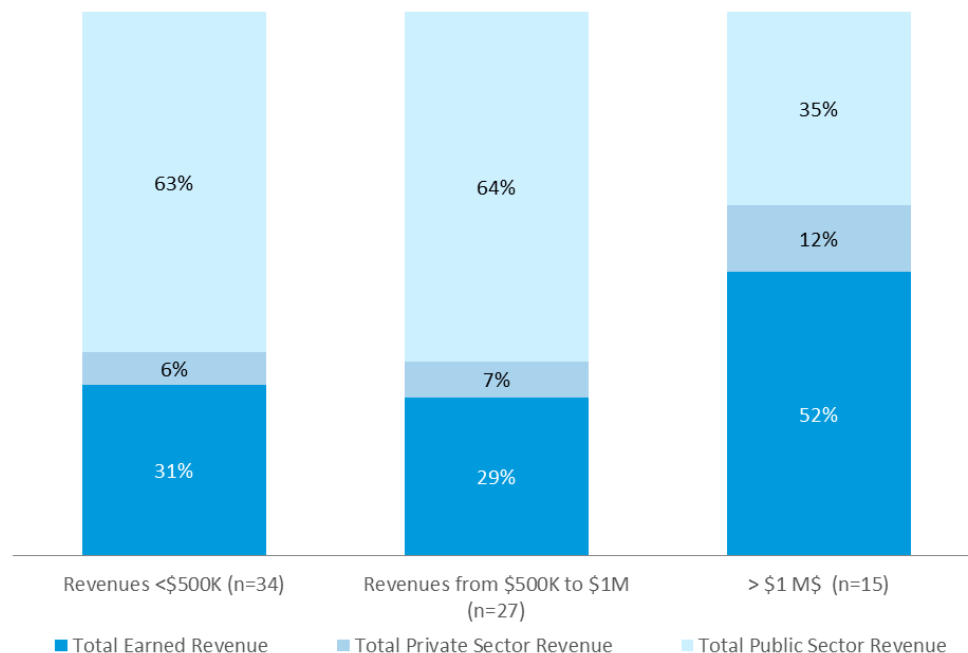


¹ Although one Francophone theatre organization was identified as a special case, it was still included in the analysis because its situation lasted for three years: 2010-11, 2011-12 and 2013-14. It was included because its situation for the other four years corresponded to the average.

From 2011-12 to 2016-17, revenue from the private sector increased considerably (9.8%) from \$6M to \$7M over these seven years. This is projected to stabilize in 2017-18 (\$7 M) but increase in 2018-19 (\$7.7M).

Earned revenue from co-production and touring fluctuated from year to year, dropping from \$39.0M in 2010-11 to \$34.7M in 2013-14, but then stabilized at around \$30M from 2014-15 on. This fluctuation was due to the relative financial value of co-productions from one year to the next. The 76 FTOs predict an increase in earned revenue of 9% to \$33.2M in 2017-18 and then a decrease to \$32.5M in 2018-19.

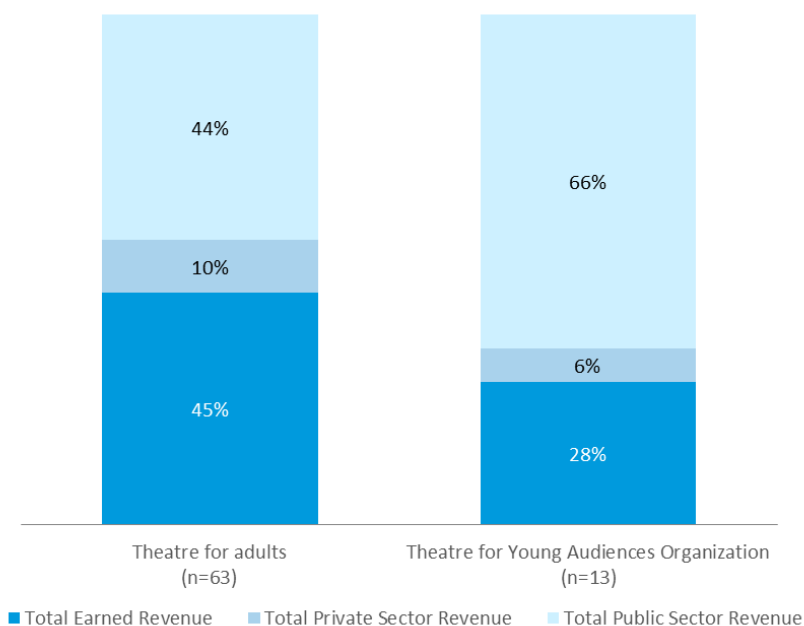
Figure 2.1: Revenue sources – by size of organization revenue, 2016-17 (n=76)



As shown in Figure 2.1, the organizations with total revenue under \$1M are those that depend the most on public funding: 63% and 64% of total revenue respectively, for the small and medium-sized categories. For the large category, this ratio drops to 35%. Relative shares of total revenue from the private sector are 6% for small organizations, 7% for medium-sized ones and 12% for large ones. Consequently, earned revenue represents a higher proportion of total revenue in large organizations (52%) than in medium-sized ones (29%) and small ones (31%).

There is a marked difference in the funding model between FTOYs and FTOAs (see Figure 2.2). Since the latter compared with the former generate more earned revenue (45% vs. 28%) and private revenue (10% vs. 6%), the share of public funding in the total revenue of FTOAs (44%) is lower than that for FTOYs (66%).

Figure 2.2 - Revenue sources – by organization type, 2016-17 (n=76)



Canada Council funding to this sector increased steadily from \$8.1M in 2010-11 to \$8.6M in 2016-17 (+6.8%), representing an overall 2% increase in the Council's share of the organizations' total revenues during this period (see Table 1). The organizations anticipate combined funding increases around 58% from the Council over the next two years: from \$8.6 million (2016-17) to \$12M (2017-18) and then to \$13.7M (2018-19). This expectation holds true for all three categories of Francophone theatre organizations.

Table 1: Revenue sources in \$M – actual and projected) (n=76)

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
Total Earned Revenue	39.0	37.8	32.1	34.7	30.2	29.9	30.4	33.2	32.5
Total Private Sector Revenue	6.3	6.4	6.9	6.4	7.0	6.4	7.0	7.0	7.7
Total Revenues	77.2	75.7	70.7	72.8	68.8	68.1	70.5	79.2	79.8
Total Public Sector Revenue	31.6	31.3	31.5	31.4	31.3	31.6	32.7	38.6	39.3
Total Canada Council Grants	8.1	8.2	8.3	8.2	8.2	8.4	8.6	12.0	13.7
Total Provincial Arts Funder Revenue	15.8	16.0	16.3	16.2	16.1	16.1	16.9	17.8	18.4
Total Municipal Arts Funder Revenue	2.0	2.1	2.2	2.2	2.2	2.1	2.3	2.6	2.6

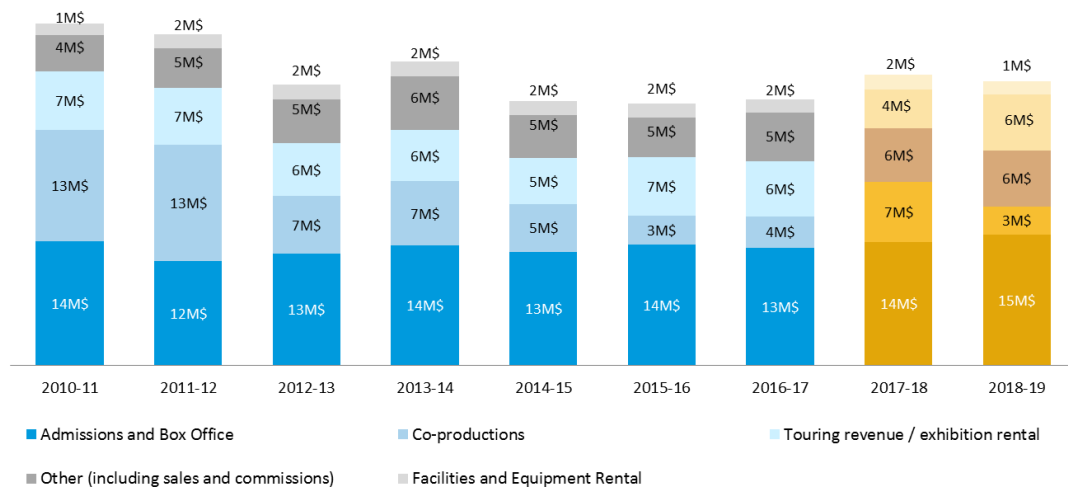
In 2016-17, FTOs obtained most of their earned revenue from admissions and box office (38%) and co-productions/touring (28%), for a total of \$23.4M. Earned revenue from admissions and box office has remained relatively stable over the past seven years. Revenues from these sources ranged from \$14.2M (2010-11) down to \$13.5M (2016-17), while touring revenue remained relatively stable at \$6.6M (2010-11) and \$6.3M (2016-17).



Fluctuations over the years have been more pronounced on the co-production front (both international and local), especially in the case of one large organization in 2010-11, 2011-12 and 2013-14. For the first two of these years, higher co-production revenue had an impact on touring revenue because co-producers are often the first to host co-produced works. As shown in Figure 3, co-production revenue dropped from \$13M in 2011-12 to \$5M in 2014-15. Thus, whereas co-productions accounted for 30% of earned revenue in 2010-11, this share dropped to 10% – 15% over the last three years (see Figure 3).³

Revenue from facility and equipment rental, as well as from other sources, has remained stable. Overall, these kinds of revenue represent a total of \$7.1M or 19% of the organizations' earned revenue in 2016-17. Education and cultural mediation activities, which are an important component of the organizations' programming, have doubled over the past seven years, even though they represent only 1% of all earned revenue.

Figure 3: Sources of earned revenue in \$M – actual and projected (n=76)



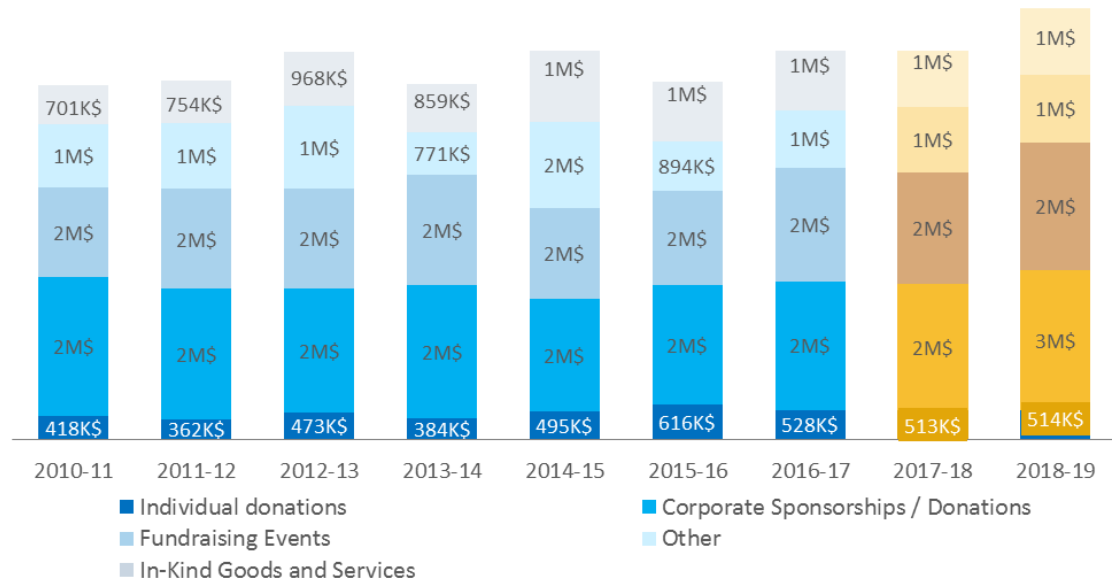
Most of the revenue from private sources⁴ comes from corporate donations and sponsorships (33%) and fundraising (29%). In 2016-17, these revenues represented 62% (\$4.3M) of total revenue from the private sector, a 6% increase over 2010-11. For the next two years, the organizations forecast that these revenues should remain essentially at the same level (see Figure 4).

Individual donations⁵ represent less than 10% of private sector revenue from year to year, totaling \$0.5M for all 76 organizations in 2016-17. No increase is forecast for the next two years.

Other revenue (goods, services, etc.) totaled \$2.1M or 30% of private sector revenue in 2016-17.



Figure 4: Sources of private sector revenue in \$M – actual and projected (n=76)



Staffing and programming

In 2016-17, the artists, cultural workers and technical personnel of the 76 FTOs received \$24.6M in fees and salaries,⁶ which represent 59% of total artistic expenses (see Table 2.1). In general, fees are paid to artists for creating and presenting theatrical works, whereas salaries are primarily paid to cultural workers who may or may not be professional artists.

Table 2.1: Remuneration of artists, cultural workers and production/technical personnel – in \$M, actual and projected (n=76)

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Artists' and professional fees	13.1	12.5	12.2	12.0	11.1	11.3	12.2
Artistic salaries - permanent and temporary employees	3.9	4.0	4.0	4.1	4.2	4.1	4.2
Production / technical services professional fees	2.8	2.7	2.6	2.8	2.3	2.3	3.0
Production / technical salaries - permanent and temporary employees	5.3	4.9	4.7	5.1	4.6	5.3	5.3
Total	25.1	24.1	23.5	23.9	22.2	22.9	24.6
% of Total Artistic Expenses	50.0 %	48.3 %	54.1 %	53.4 %	54.5 %	56.8 %	58.5 %

It is important to mention that 96% of the artists hired⁷ by the organizations were of Canadian nationality in 2016-17, as shown in Table 2.2.

Table 2.2: Canadian artists (n=76)

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Total number of Canadian artists who received artists fees	2,177	2,241	2,284	2,086	2,580	2,499	2,715
% in Total Artists	94.4 %	95.0 %	94.5 %	95.6 %	96.4 %	96.7 %	96.3 %

The fluctuations in artists' fees during the seven years is due to an uneven pattern of co-productions and touring. On the other hand, the salaries of artistic personnel remained relatively stable during this time.

As shown in Table 3,⁸ around \$40M – or 56.2% of total expenses – in 2016-17 were paid in salaries and professional fees to artists, technical personnel and the other staff responsible for marketing, fundraising, administration and facility operations. This amount represents 120% of the total public sector funding in 2016-17 and also represents 129% of total earned revenue. This figure has been growing by 1% annually since 2010-11. Since 2013-14, the relative share of salaries and professional fees in the organizations' overall budgets has increased by 3.6%.

The amount for salaries and professional fees was higher between 2010-11 and 2013-14 than in 2014-15 due to the higher level of co-productions and touring during those years. However, this amount increase subsequently to \$39.1M in 2016-17. The organizations anticipate that these expenses should climb to \$42.4M in 2017-18.

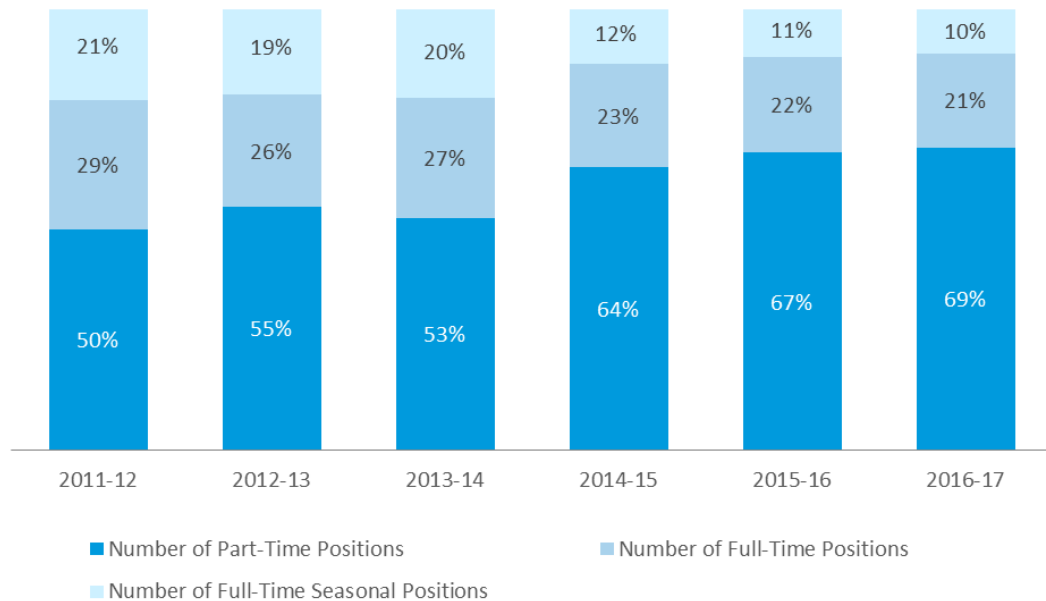
Table 3: Salaries and professional fees (n=76)

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
Total Salaries and Professional Fees	37.5	37.2	36.7	37.4	35.9	37.1	39.1	42.4	43.5
% of Total Expenses	50.0 %	49.2 %	52.9 %	52.6 %	53.2 %	55.2 %	56.2 %	54.2 %	54.9 %

In 2016-17, 21% of all FTO positions were full-time year-round (see Figure 5), compared with 29% for all arts organizations registered in the CADAC system. The proportion of part-time positions increased from 47% in 2010-11 to 69% in 2016-17, whereas over the past seven years the proportion of full-time positions dropped by eight percentage points – from 29% to 21%, and that of seasonal positions from 25% to 10%. These data reflect both fewer co-productions/tours and fewer full-time positions.

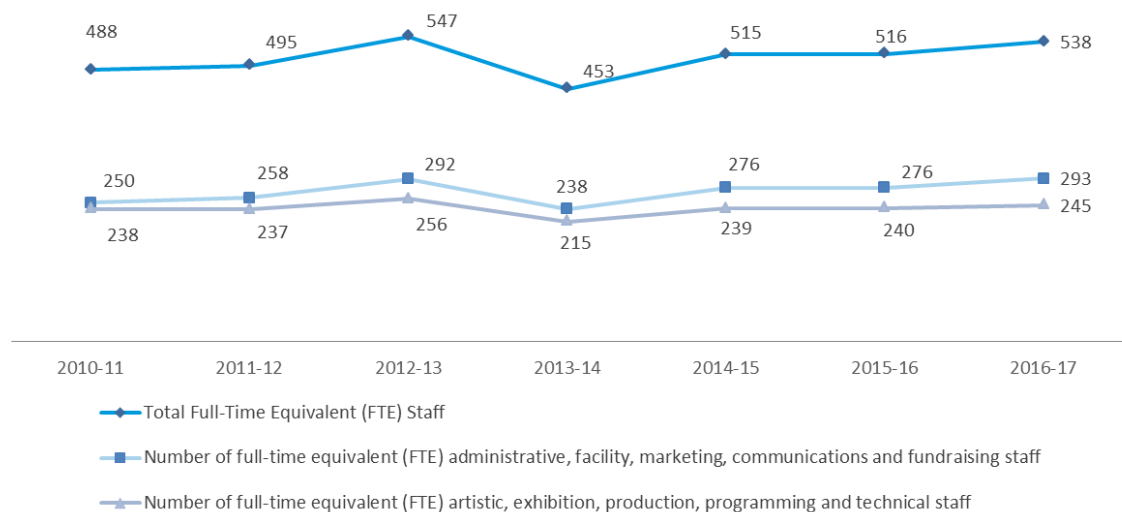


Figure 5: Number of positions (n=76)



In 2016-17, the 76 FTOs had a total of 538 full-time equivalent (FTE) staff,⁹ more than half of whom (245) were assigned to artistic, production or programming activities. During the four years subsequent to 2013-14, this number steadily increased by an overall 19% (see Figure 6). The variations in the number of artistic, technical and administrative positions during the first three years of the period under review were due to co-productions and touring. However, during this period, the relative share of FTEs assigned to artistic activities remained basically the same in the 76 Francophone theatre organizations.

Figure 6: Full-time equivalent (FTE) staff levels (n=76)



Apart from salaries and professional fees in 2016-17, the 76 FTOs spent \$15.2M or 21.9% of their total expenses on programming activities such as production, presentation, etc. (see Table 4). This percentage is slightly higher than that recorded for all CADAC arts organizations (20.4 %).

Table 4: Total programming and production expenses (n=76)

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
Total Programming Expenses	22.5	23.5	17.3	18.0	16.2	14.6	15.2	18.2	18.6
% of Total Expenses	30.0 %	31.1 %	25.0 %	25.3 %	24.1 %	21.8 %	21.9 %	23%	23%

The proportions of 30% for programming and production expenses in 2010-11 and 31.1% in 2011-12 confirm the importance of these activities during the period when co-productions and touring generated a greater share of the organizations' revenues. For each dollar spent in programming and production in 2016-17, the 76 FTOs generated an average of \$1.92 in earned revenue.

Summary

Between 2010-11 and 2014-15, the total revenue of FTOs fluctuated considerably due to earned revenue from co-production and touring and the exceptional revenue generated by a single organization.² Indeed, their combined revenue was much higher in 2010-11 (\$77.2M) and in 2011-12 (\$75.7M) than in 2014-15 (\$68.8M) and 2016-17 (\$70.5M). Overall, the total revenue of the 76 FTOs increased by 2.5% from 2014-15 to 2016-17.

The ratio of earned revenue dropped by 7.4% over the last seven years. This decrease was offset by a 1.8% increase in contributions from the private sector and a 5.4% increase in public sector funding. In 2016-17, 38% of earned revenue (\$13.5M) came from admissions and box office and 28% from co-productions and touring (\$9.9M). Total earned revenue represents a higher proportion of overall revenue in large FTOs (52%) than in those with budgets of under \$1M (29%) and those with budgets under \$500K (31%). Total earned revenue in FTOAs represents a higher proportion of all revenue (45%) than in FTOYs (28%).

The public sector contribution to FTO revenues remained essentially the same from 2010-11 to 2015-16 within a small range from \$31.3M to \$31.6M. However, there was a more substantial increase of \$1.1M in 2016-17 to a total of \$32.7M. Since 2010-11, the growth in public sector funding has been primarily due to a larger contribution from provincial agencies (+\$1.1M). The ratio of the public sector contribution to all revenue increased from 41.0% in 2010-11 to 46.4% in 2016-17.

There is a marked difference in the financial model between FTOYs and FTOAs, with the latter generating a higher proportion of earned revenue (45%) and private sector support (10%) in their total revenue than the former (28% and 6% respectively), which naturally affects the relative share of public sector funding in their total revenue (66% vs. 44%).

Private sector revenue increased significantly (11%) from \$6.3M to \$7.0M over the seven years. In 2016-17, most of this revenue came from corporate donations and sponsorships (33%) and fundraising (29%) for a total of \$4.3M, a 6% increase over 2010-11. Individual donations to the 76 FTOs represent less than 10% of their revenue from private sources, totaling \$0.5M in 2016-17.

Approximately \$40M or 56.2% of total expenses were paid in salaries and professional fees for all personnel in 2016-17. Overall employment has increased by 19% since 2013-14. The relative share of part-time positions increased from 50% in 2010-11 to 69% in 2016-17, which resulted in a corresponding drop in the relative share of both full-time year-round positions (-8%) and full-time seasonal positions (-11%) over the last seven years.

In total, 2,715 Canadian artists (96% of all artists) received fees from FTOs during 2016-17.

² Although one Francophone theatre organization was identified as a special case, it was still included in the analysis because its situation lasted for three years: 2010-11, 2011-12 and 2013-14. It was included because its situation for the other four years corresponded to the average.

2. Artistic activities and public attendance¹⁰

Activities and attendance¹¹

In 2016-17, FTOAs gave 2,277 public performances to some 500,000 spectators in cities, municipalities or reserves, compared with 528 performances by FTOYs to more than 66,000 spectators (see Tables 5.1 and 5.2).¹² From 2010-11 to 2016-17, the total number of performances by FTOAs increased by 10.8%, whereas this number dropped by 25% in the case of FTOYs.

Furthermore, local theatre attendance dropped by 11% for adults and 10% for children and youth during the same period. Admissions and box office generated \$13.5 M locally for FTOs in 2016-17, a 5% drop over 2010-11.

Table 5.1: Local activities, attendance and revenue – FTOAs, n=63

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Number of public performances produced by your organization and presented in your city / town / reserve	2,055	2,041	1,908	1,872	2,074	2,053	2,277
Attendance	558,820	629,446	429,666	359,874	578,279	594,250	501,124
Production admissions and box office (in CA\$ million)	14.0	11.7	12.5	13.5	12.8	13.6	13.2

Table 5.2: Local activities, attendance and revenue – FTOYs, n=13

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Number of public performances produced by your organization and presented in your city / town / reserve	662	520	592	308	305	441	528
Attendance	72,902	60,919	73,081	49,356	56,938	56,911	66,252
Production admissions and box office (in CA\$ million)	0.2	0.2	0.2	0.2	0.2	0.2	0.3

In 2016-17, FTOAs also gave 808 performances in Canada outside their city, municipality or reserve, as well as 262 performances abroad, a sharp drop from the highs achieved in previous years in terms of both performance and spectator numbers.

For their part, FTOYs gave 535 performances in Canada outside their city, municipality or reserve and 211 abroad (see Tables 6.1 and 6.2). The number of spectators attending touring productions by FTOYs in Canada dropped from 159,261 to 108,018, while attendance abroad also dropped – from 46,336 to 26,681 despite an increased number of performances.

Table 6.1: National and international activities, attendance and revenue – FTOAs, n=63

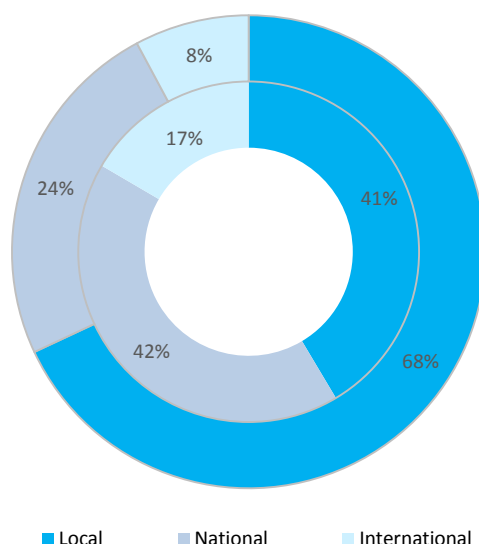
	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Number of public performances produced by organizations and presented nationally	972	968	1,080	1,159	888	1,111	808
Attendance	224,043	245,418	166,188	216,630	195,931	280,491	176,367
Number of public performances produced by organizations and presented internationally	340	215	459	431	246	289	262
Attendance	170,443	130,015	188,478	67,072	68,374	87,467	111,929
Total number of public performances	3,367	3,224	3,447	3,462	3,208	3,453	3,347

Table 6.2: National and international activities, attendance and revenue – FTOYs, n=13

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Number of public performances produced by organizations and presented nationally	644	703	469	640	575	501	535
Attendance	159,261	163,560	108,297	136,886	113,731	97,045	108,018
Number of public performances produced by organizations and presented internationally	132	126	149	149	166	125	211
Attendance	45,336	41,033	45,665	30,859	35,840	21,388	28,681
Total number of public performances	1,438	1,349	1,210	1,097	1,046	1,067	1,274

The relative proportion of number of performances by FTOAs in each market in 2016-17¹³ is shown in Figure 7. These organizations gave 68% of their performances locally, 24% elsewhere in Canada, and 8% abroad. For their part, FTOYs gave 41% of their performances locally, 42% elsewhere in Canada, and 17% abroad.

Figure 7: Location of performances by FTOAs (outer ring) and FTOYs (inner ring) in 2016-17 (n=76)



In 2016-17, the number of new Canadian works created reached a high of 177, 77% of which were by FTOAs and 23% by FTOYs.

Table 7: New works (n=76)

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Number of new works presented or exhibited which were created by or commissioned from Canadian artists	87	107	116	98	98	110	136
Number of new works specifically for children up to 14 years of age presented or exhibited which were created by or commissioned from Canadian artists	19	17	13	17	16	12	12
Number of new works specifically for youth 15-24 years of age presented or exhibited which were created by or commissioned from Canadian artists	15	29	38	37	24	29	29
Total Number of New Works	121	153	167	152	138	151	177

Arts education/learning activities and public participation¹⁴

In 2016-17, 142,396 people participated in 3,224 arts education/learning activities offered by 75 FTOs (see Table 8).¹⁵ Activity level and number of participants vary considerably from year to year, as reflected in the high achieved in 2011-12 and the considerable drop in 2015-16.³

Table 8: Arts education/learning activities (n=75)

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Total Number of Arts Education and Arts Learning Activities	3,031	3,233	3,143	2,727	2,329	2,809	3,224
Attendance	115,144	170,576	152,551	173,778	130,532	111,208	142,396

The total number of activities for all audiences increased during the period, as did the total number of participants (see Table 9).¹⁶ In 2016-17, the number of participants who add value to artistic programming, such as meetings with authors, actors and other Francophone theatre professionals were three times higher than the number taking part in workshops.

Table 9: Activities for adults or all ages, and public participation (n=76)

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Number of activities that add value to artistic programming	879	1,132	1,021	742	600	744	924
Participants	36,594	68,726	49,188	38,368	40,807	33,463	61,232
Number of training workshops	547	483	671	758	818	1,023	866
Participants	10,729	7,549	13,312	11,723	15,700	16,360	18,201
Total Number of Community Arts Projects	39	15	14	20	16	16	17
Attendance and Participants	4,688	3,964	1,849	3,439	3,970	4,116	6,118

In 2016-17, more than 25% of arts education activities were for children and around 7% for youth (see Table 10).¹⁷ A total of 67,035 children and youth took part in these activities.

³ The statistical data, unlike the financial data, were not checked by an external source, which may explain considerable year-to-year variation.

Table 10: Activities for children and youth, and public participation (n=74)

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Percentage of total activities for children	33.3 %	27.3 %	23.0 %	10.0 %	20.8 %	23.8 %	25.4 %
Percentage of total activities for youth	4.1 %	6.8 %	8.5 %	36.0 %	10.5 %	5.4 %	6.9 %
Attendance and Participants	86,019	77,520	110,141	110,538	93,607	60,324	67,035

As shown in Table 11, although the number of workshops for teachers and the number of participants in these workshops are increasing slightly, these numbers continue to be marginal. An average of 40 teacher's guides are prepared each year.

Table 11: Teachers and training programs (n=76)

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Number of workshops for teachers	2	2	11	12	14	16	22
Participants	28	30	100	110	138	312	610
Number of study guides, curriculum and curriculum-related material	38	40	37	36	35	36	43

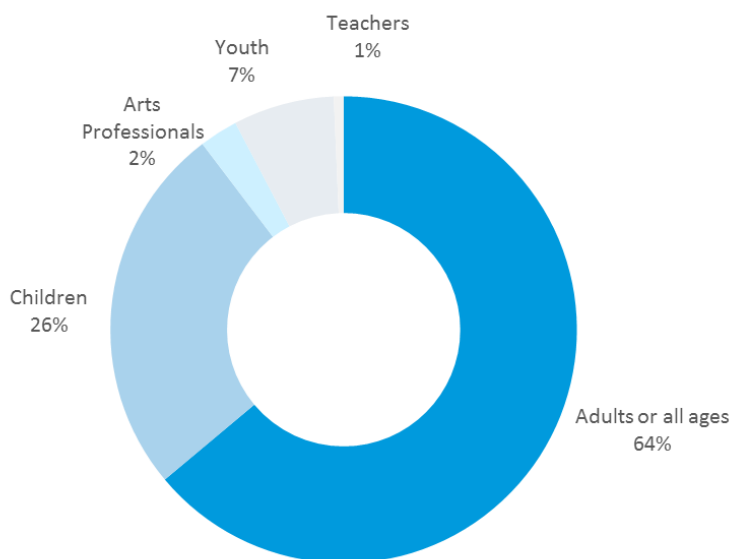
As shown in Table 12, there was considerable variation during the period in the number of training programs and activities, as well as in the number of talks. On the other hand, the number of artist residencies continues to increase, rising from 28 in 2010-11 to 114 in 2016-17.

Table 12: Activities for arts professionals (n=76)

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Number of professional training programs	7	6	5	5	4	4	10
Participants	29	29	35	43	38	46	121
Number of professional development activities	105	108	99	105	77	81	77
Participants	353	391	654	764	513	312	485
Number of artists-in-residence projects	28	28	39	66	89	83	114
Participants including public	-	285	4,537	3,658	2,765	703	669
Number of conferences organized and presented by organizations	26	38	41	48	78	56	47
Total participants	382	420	689	807	551	358	606

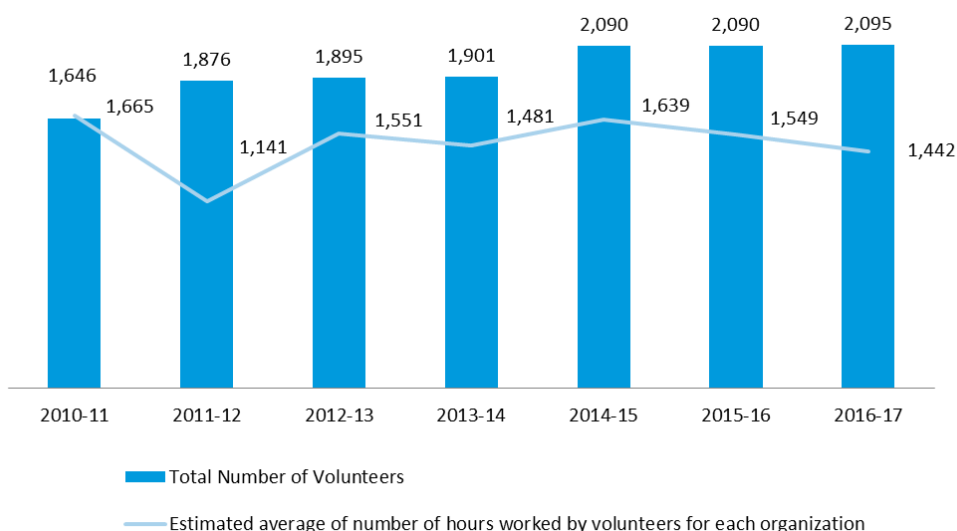
Overall, with respect to all the audiences that participated in arts education and professional development activities in 2016-17, the adult audience is the largest (64%), followed by children (26%) and youth (7%), as shown in Figure 8.

Figure 8: Arts education and professional activities offered to: (n=76)



Lastly, as shown in Figure 9,¹⁸ 2,095 volunteers were recorded in 2016-17, a definite improvement since 2010-2011. Although the number of volunteers has increased, the average number of volunteer-hours per organization remained stable during the period. In 2016-17, volunteers collectively contributed 109,592 hours of their time to the 76 Francophone theatre organizations.

Figure 9: Number of volunteers with estimated average number of volunteer hours worked per organization (n=76)





Summary

In 2016-17, FTOs received \$13.5 M in admissions and box office revenue locally, a 5% decrease over 2010-11.

In 2016-17, the 63 FTOAs programmed and presented 2,277 public performances locally, 808 nationally, and 262 abroad. For their part, the 13 FTOYs gave 528 performances locally, 535 nationally, and 211 abroad. Total attendance at all the performances produced by the 76 FTOs was over 992,000.

In 2016-17, the number of new Canadian works created by the 76 FTOs reached a high of 177, 77% of which were by FTOAs and 23% by FTOYs.

Arts education/learning activities represent a major portion of the activities designed to connect FTOs with their community. In 2016-17, approximately 143,000 people participated in more than 3,220 activities, around half of whom took part in activities that added value to the artistic programming, such as meetings with authors, actors and other Francophone theatre professionals. There were 114 artist residencies in 2016-17 compared with 28 in 2010-11, an ongoing increase for the period. An average of 40 teacher's guides are prepared each year.

In 2016-17, 25% of all arts education/learning activities were for children and 7% for youth. More than 67,000 children and youth attended or participated in these activities; and some 2,100 volunteers collectively contributed more than 109,000 hours of their time.

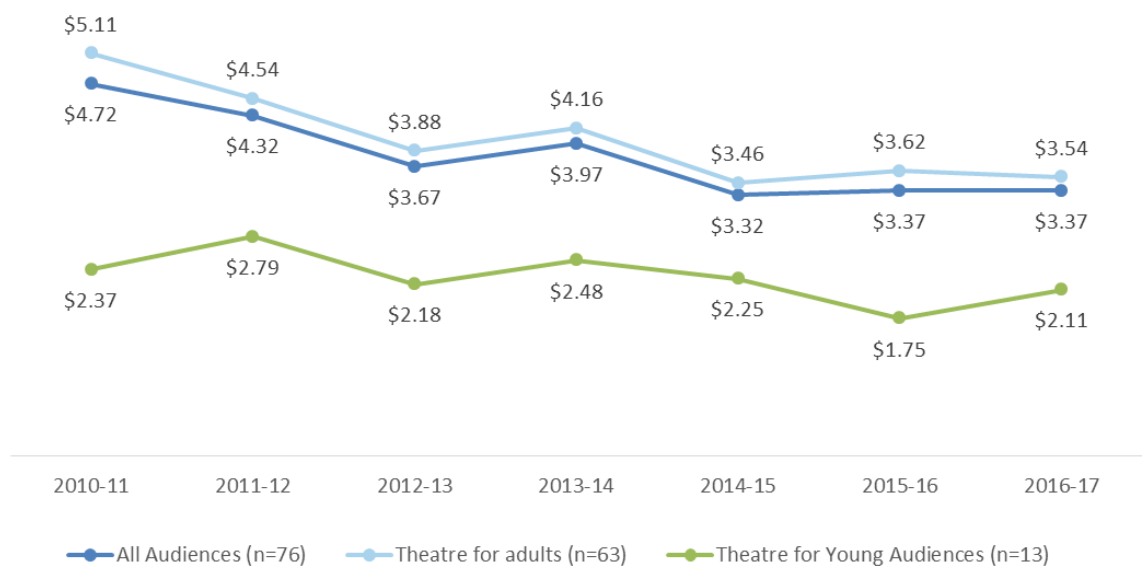
3. Financial position and long-term continuity

Marketing and fundraising activities

In 2016-17, the 76 FTOs made \$3.37 in earned revenue for each dollar spent in marketing activities. Even though this ratio has fallen by 31% since 2010-11,¹⁹ when each dollar invested in marketing generated \$4.72 in earned revenue, the return on marketing investment (ROMI) in 2016-17 (\$3.37) is close to the average for all CADAC organizations (\$3.82).

As shown in Figure 10, ROMI was smaller but more stable for FTOYs than for FTOAs.

Figure 10: ROMI – each dollar spent in marketing/communication generates X dollars in total earned revenue, by organization type (n=76)

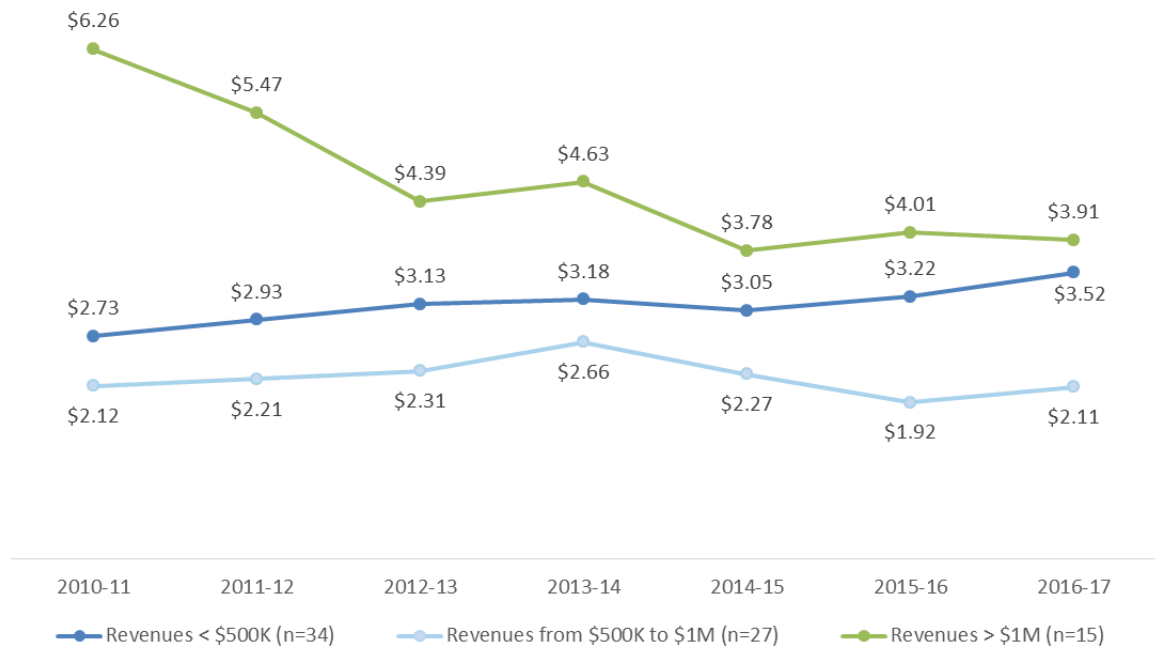


As shown in Figure 11,²⁰ organizations with annual revenues above \$1M produced a higher ROMI than the two other categories in 2016-17, generating \$3.91 for every marketing dollar invested compared with an ROMI of \$3.52 for organizations with budgets of under \$500K and \$2.11 for organizations with budgets from \$500K– \$1M.

The drop in ROMI from 2010-11 to 2012-13 for organizations with annual revenue above \$1M was due to lower co-production touring revenues; during the same period ROMI for organizations with revenue below \$500K increased from \$2.73 to \$3.52, and remained relatively stable for organizations with budgets from \$500K– \$1M.

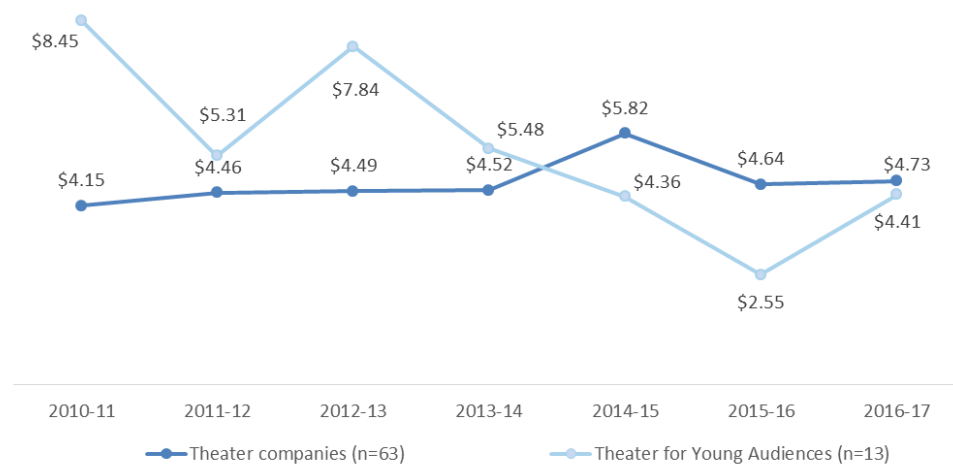


Figure 11: ROMI – each dollar spent in marketing/communications generates X dollars in total earned revenue, by size of organization revenue (n=76)



The respective returns on fundraising investment (ROFI) for FTOAs and FTOYs are shown in Figure 12. In 2016-17, each fundraising dollar returned \$4.73 in private sector revenue to FTOAs and \$4.41 to FTOYs, compared with ROFI of \$5.36 for all CADAC organizations. Whereas ROFI for FTOYs seesawed with a significant drop in 2015-16 due to a substantial increase in these expenses by three FTOYs, the same indicator for FTOAs has risen by 14% since 2010-11.²¹

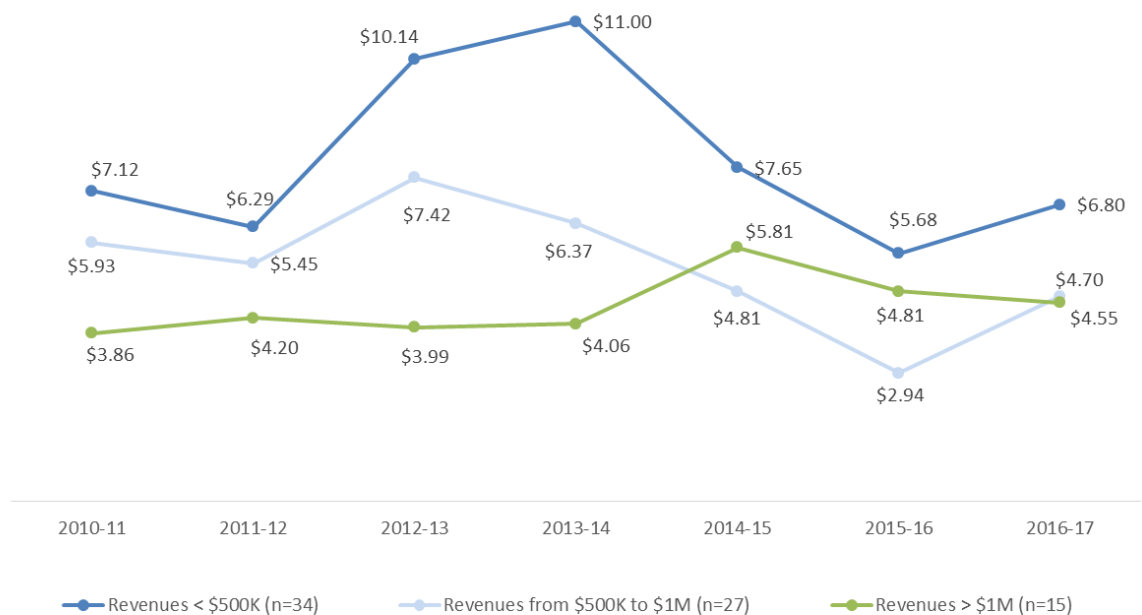
Figure 12: ROFI – \$1 generates \$x of private sector revenue for FTOAs and FTOYs





As shown in Figure 13, organizations with under \$500K in revenue received the most private sector support for each fundraising dollar invested: \$6.80 in 2016-17, compared with \$4.70 for organizations with budgets above \$1 M, and \$4.55 for organizations with budgets from \$500K – \$1M. The sharp drop in ROFI in 2015-16 was due to a substantial increase in fundraising expenses by three organizations with revenues from \$500K – \$1M.

Figure 13: ROFI – \$1 generates \$x, by size of organization revenue (n=76)



Financial structure and ratios

The financial structure of the 76 FTOs is shown in Table 13.²² Except for the first three years of the period under review, when high co-production and touring revenues greatly increased artistic expenses and proportionally reduced all other types of expenses in the overall picture, the financial structure of this group was relatively stable.

The relative shares of administrative, marketing and fundraising expenses correspond to the average for all CADAC performing arts organizations. The relatively high facility operating expenses (10.9% in 2016-17) reflect maintenance of the buildings that many theatre organizations own, unlike the lower costs in this respect for opera companies (3%) and music or dance organizations.

Table 13: Artistic and administrative expenses (n=76)

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Total Artistic Expenses	66.9 %	66.1 %	62.5 %	63.0 %	60.4 %	59.9 %	60.5 %
Total Facility Operating Expenses	8.5 %	8.8 %	9.9 %	10.1 %	10.5 %	10.9 %	10.9 %
Total Administration Expenses	11.6 %	11.7 %	12.9 %	12.7 %	13.7 %	13.8 %	13.5 %
Total Marketing and Communications Expenses	11.0 %	11.6 %	12.6 %	12.3 %	13.5 %	13.2 %	13.0 %
Total Fundraising Expenses	2.0 %	1.9 %	2.2 %	2.0 %	1.8 %	2.2 %	2.1 %

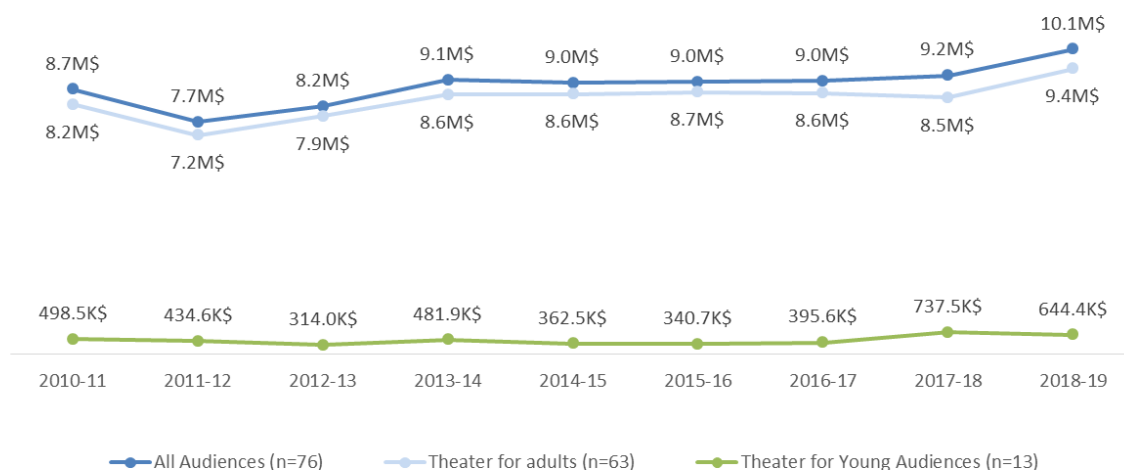
In 2016-17, the 76 FTOs posted earned revenue of \$23.17 per participant and average expenses of \$52.97 per participant (see Table 14²³). Total expenses remained stable compared with 2010-11, while earned revenue dropped by 18%, mainly due to lower co-production and touring revenues.

Table 14: Revenue earned and spent per participant (n=76)

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Earned Revenue / Attendee	27.40 \$	25.38 \$	24.23 \$	30.97 \$	22.81 \$	20.72 \$	23.17 \$
Expense / Attendee	52.62 \$	50.81 \$	52.46 \$	63.37 \$	50.91 \$	46.57 \$	52.97 \$

The overall accumulated surplus situation of FTOs is shown in Figure 14.²⁴ During the period, the accumulated surplus increased from \$8.7 M in 2010-11 to \$10.1 M in 2016-17. Most of the surplus was generated by FTOAs (\$9.4 M in 2016-17), reflecting the major role played by net capital assets such as buildings and equipment on theatre balance sheets.

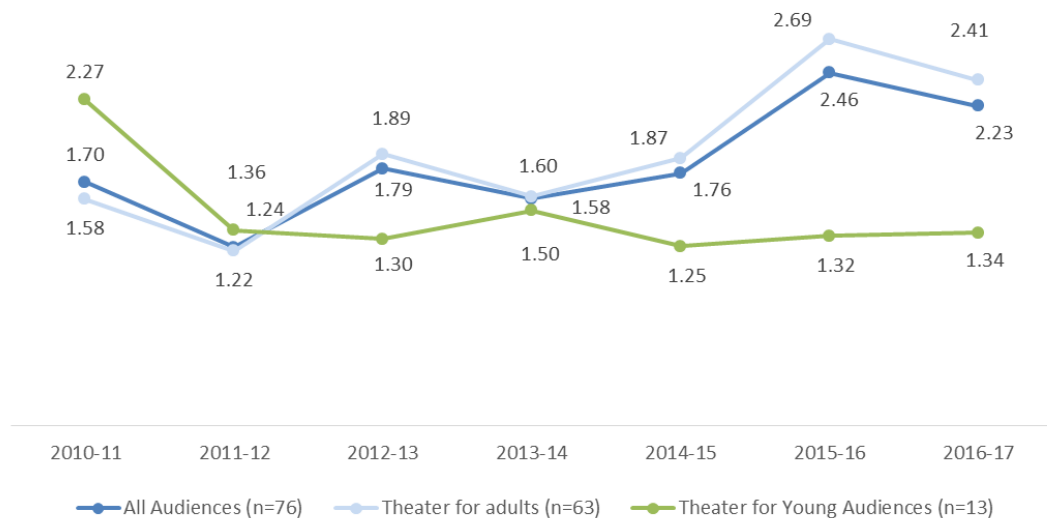
Figure 14: Accumulated surplus (n=76)





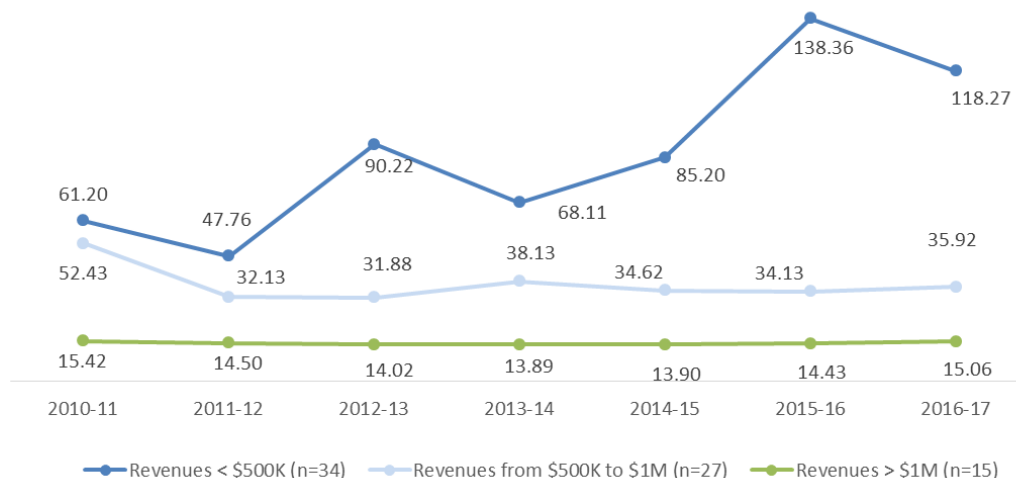
The working capital ratio of FTOs rose from 1.70 in 2010-11 to 2.23 in 2016-17. Despite this increase, it remains 0.23 percentage points below the high (2.46) posted in 2015-16 (see Figure 15.1).²⁵ The working capital ratio indicates an organization's ability to pay its debts when they come due. In general, the higher the ratio, the greater the organization's financial flexibility. In 2016-17, the average working capital ratio of all CADAC organizations was 0.95. While FTOAs in 2016-17 posted a higher ratio (2.41) than the average for CADAC organizations, the opposite was true for FTOYs (1.34).

Figure 15.1: Working capital ratio, by audience type (n=76)



FTOs with annual revenues of under \$500K enjoy the best working capital ratio of all three categories (see Figure 15.2).²⁶ Conversely, organizations with an annual budget of above \$1M suffer from the weakest working capital ratio of the three categories, even though their ratio remained stable during the period because organizations in this category often benefit from the foundation in which available funds are re-invested.

Figure 16: Working capital ratio, by size of organization revenue (n=76)



As shown in Table 15,²⁷ the operating margin for FTOs as a whole averaged 1.95% for the seven financial years covered by this report, dropping to 1.3% in 2016-17. The benchmark average for all CADAC organizations in 2016-17 was 2.81%. In general, lower operating margins compromise an organization's ability to allocate revenue for future projects.

The decline in Francophone theatre organizations' operating margins during the last four financial years explains the concomitant decline in their total asset surplus since 2013-14. Furthermore, the debt-equity ratio of these organizations averaged 86.1% during the period, which is higher than the ratio for all CADAC organizations (64.7% in 2016-17).

Table 15: Financial ratios (n=76)

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Revenue Growth		-1.9%	-6.6%	2.9%	-5.4%	-1.0%	3.4%
Operating Margin	2.9%	0.0%	1.8%	2.3%	2.0%	1.4%	1.3%
Surplus to Total Assets	2.2%	0.0%	1.2%	1.7%	1.5%	1.0%	1.0%
Debt to Assets	86.2%	87.1%	87.4%	86.4%	85.7%	85.2%	84.9%



Summary

The financial data for the 76 CADAC-registered FTOs show:

A 31% drop in ROMI from \$4.72 in 2010-11 to \$3.37 in both 2015-16 and 2016-17, which is slightly below the benchmark average for all CADAC organizations (\$3.82 in 2016-17).

A 14% increase in ROFI for Francophone adult theatre organizations, from \$4.15 in 2010-11 to \$4.73 in 2016-17); however, this indicator for FTOYs was more erratic during the period, ending up at \$4.41 in 2016-17.

A stable financial structure is the basis for an ongoing balance between artistic, operating, administrative, marketing and fundraising expenses. Except for the first three years of the period, when higher co-production and touring revenues greatly increased artistic expenses, the financial structure of FTOs was relatively stable, averaging 60% for artistic expenses, 13% for administration and marketing, and 2% for fundraising. The only expense category that changed significantly was facility operations, which rose steadily during the period from 8.5% of total expenses to 10.9%.

The overall accumulated surplus grew from \$8.7 M in 2010-11 to \$10.1 M in 2016-17. Most of the surplus was generated by FTOAs (\$9.4 M in 2016-17).

The working capital ratio (short-term assets / short-term liabilities) rose from 1.70 to 2.23 over the past seven financial years.

During this period, the 76 FTOs lowered their debt-equity ratio from 86.2% in 2010-11 to 84.9% in 2016-17, despite a total asset surplus that dropped from 2.2% in 2010-11 to 1% in 2016-17. This decline in total asset surplus reflects the drop in operating margins over the past four years. According to the relevant research, this could indicate looming financial imbalance, in spite of solid debt-equity and working capital ratios.

¹ All the amounts are expressed in current (nominal) dollars and have not been adjusted for inflation.

² The information was obtained from the following CADAC lines: 4175 Total earned revenue, 4345 Total private sector revenue, 4550 Total public sector revenue, and 4700 Total Revenues.

³ The information was obtained from the following CADAC lines: 4105 Production admissions and box office from subscriptions/ admissions, membership or group admissions, 4110 Production admissions and box office from single ticket sales, 4115 Co-productions, 4120 Touring revenue / exhibition rental, 4145 Fees from workshops / classes / annual meetings / seminars / colloquia, 4150 Revenue from associated school (gross), 4160 Sales, commission and broadcasting (gross), and 4165 Facilities and equipment rental, sale of works of art.

⁴ The information was obtained from the following CADAC lines: 4305 Individual donations, 4310 Corporate donations, and 4330 Fundraising events.

⁵ Note: Individual donations include donations of artworks in addition to financial donations.

⁶ Information obtained by adding the figures for the following lines in the CADAC form: 5105 Artists' and professional fees, and 5110 Artistic salaries – permanent and temporary employees.

⁷ The information was obtained from the following CADAC lines: 2325 Number of Canadian artists, and 2340 Total number of artists, not on salary, paid artists' fees.

⁸ The information was obtained from the following CADAC lines: 5105 Artists' and professional fees, 5110 Artistic salaries – permanent and temporary employees, 5125 Production / technical salaries – permanent and temporary employees, 5130 Production / technical services professional fees, 5205 Facility operating salaries – permanent and temporary employees, 5210 Facility operating professional fees, 5305 Marketing and communication salaries – permanent and temporary employees, 5310 Marketing and communications professional fees, 5405 Fundraising salaries – permanent and temporary employees, 5410 Fundraising and professional fees, 5505 Administrative salaries – permanent and temporary employees, 5510 Administrative professional fees, and 5600 Total Expenses.

⁹ The information was obtained from the following CADAC lines: 2360 Number of full-time equivalent (FTE) artistic, exhibition, production, programming and technical staff, 2385 Number of full-time equivalent (FTE) administrative, facility, marketing, communications and fundraising staff, and 2405 Total full-time equivalent staff.

¹⁰ The statistical data have not been checked and correspond to reports produced by the organizations; these data may include double counting.

¹¹ The information was obtained from the following CADAC lines: 1140 Number of public performances and literary readings produced by your organization, 1545 Total attendance at Public Performances and Literary Readings, 4105 Production admissions and box office from subscriptions / admissions membership or group admissions, 4110 Production admissions and box office from single ticket sales, and 2350 Total number of artists.

¹² The information was obtained from the following CADAC lines: 1140 Number of public performances and literary readings produced by your organization, 1545 Total attendance at Public Performances and Literary Readings, 4105 Production admissions and box office from subscriptions / admissions membership or group admissions, 4110 Production admissions and box office from single ticket sales, and 2350 Total number of artists.

¹³ The information was obtained from the following CADAC lines: 2325 Number of Canadian artists, and 2350 Total number of artists.

¹⁴ The information was obtained from the following CADAC lines: 2155 Total number of arts education activities, 2160 Total attendance at / number of participants in arts education activities, 1420 Total Number of Community Arts Activities, 1670 Total Number of Participants in Community Arts Activities, and 1700 Total Attendance at Community Arts Activities.

¹⁵ The information was obtained from the following CADAC lines: 2155 Total number of arts education activities, 2160 Total attendance at / number of participants in arts education activities, 1420 Total Number of Community Arts Activities, 1670 Total Number of Participants in Community Arts Activities, and 1700 Total Attendance at Community Arts Activities.

¹⁶ The information was obtained from the following CADAC line: 2015 Number of Arts Education Activity Types.

¹⁷ The information was obtained from the following CADAC lines: 2040 Number of activities in which children up to 14 years of age create work, 2050 Number of activities specifically designed for children up to 14 years of age, 2075 Number of activities in which youth 15-24 years of age create work, and 2085 Number of activities specifically designed for youth 15-24 years of age.

¹⁸ The information was obtained from the following CADAC lines: 2425 Total number of volunteers, and 2430 Estimate number of hours worked by all volunteers.

¹⁹ Calculation using CADAC lines: 4175 Total earned revenue / 5330 Total Marketing and Communications Expenses.

²⁰ Calculation using CADAC lines: 4345 Total private sector revenue / 5425 Total Fundraising Expenses.

²¹ Calculation using CADAC lines: 4345 Total private sector revenue / 5425 Total Fundraising Expenses.

²² Calculation using CADAC lines: 5235 Total Facility Operating Expenses, or 5195 Total Artistic Expenses, or 5525 Total Administration Expenses / 5600 Total Expenses.

²³ The information was obtained from the following CADAC line: 6215 Accumulated surplus or (deficit), end of year.

²⁴ The information was obtained from the following CADAC line: 6360 Working capital ratio.

²⁵ The information was obtained from the following CADAC line: 6360 Working capital ratio.

²⁶ The information was obtained from the following CADAC line: 6315 Invested in capital/fixed assets, and 6340 Total Net Assets.

²⁷ Calculation using CADAC lines: Revenue growth (% annual growth in total revenue) = $\frac{\text{Total revenue } t - \text{total revenue } t-1}{\text{Total revenue } t-1}$. Operating margin (ratio of surplus to total revenue) = $\frac{(4700 \text{ Total Revenues} - 5600 \text{ Total Expenses})}{4700 \text{ Total Revenues}}$. Measures the ability or wish to allocate revenues to future financial years. A negative value is a clear sign of financial difficulties. Total asset surplus (operating surplus generated by each asset dollar) = $\frac{(4700 \text{ Total Revenues} - 5600 \text{ Total Expenses})}{6275 \text{ Total Assets}}$. A high ratio indicates that investments in assets generate a high surplus. A low ratio is likely to increase capital costs. A negative ratio is a clear indicator of financial difficulties. Debt-equity ratio (a measurement of leverage) = $\frac{6300 \text{ Total Liabilities}}{6275 \text{ Total Assets}}$. Measures the ratio of total liabilities to total assets. A high or increasing value may indicate future problems for an organization in terms of its solvency and its ability to discharge its debts when they come due. A low ratio of under 1 is considered a positive sign.

Appendix

Below is a list of the Francophone theatre organizations included in this report.

Legal Name	City	Province
Association Franco Albertaine de LUniThéâtre	Edmonton	Alberta
Bluff Productions inc.	Laval	Quebec
Centaur Foundation for the Performing Arts	Montréal	Quebec
Centre du Théâtre d'Aujourd'hui	Montréal	Quebec
Collectif Nous sommes ici	Québec	Quebec
Dynamo Théâtre	Montréal	Quebec
Espace Go Inc.	Montréal	Quebec
Geordie Productions Inc.	Montréal	Quebec
Imago Theatre Inc.	Montreal	Quebec
Infrarouge Théâtre	Montréal	Quebec
Jamais Lu	Montréal	Quebec
Joe Jack & John	Montréal	Quebec
La Compagnie Jean Duceppe	Montréal	Quebec
La coopérative de théâtre l'Escaouette ltée	Moncton	New Brunswick
La Fondation du Théâtre du Nouveau Monde	Montréal	Quebec
La Rubrique Inc.	Jonquière	Quebec
L'ACTIVITÉ	Montréal	Quebec
L'Arrière Scène, centre dramatique pour l'enfance et la jeunesse en Montérégie	Beloeil	Quebec
Le Carrousel, compagnie de théâtre	Montréal	Quebec
Le Cercle Molière	Winnipeg	Manitoba
Le Groupe de la Veillée	Montréal	Quebec
Le Petit Théâtre de Sherbrooke Inc.	Sherbrooke	Quebec
Le Projet Ex Machina	Québec	Quebec
Le Theatre BTW Inc.	Montreal	Quebec
Le Théâtre de l'Opsis inc.	Montréal	Quebec
Le Théâtre des Confettis inc.	Québec	Quebec
Le Théâtre du Nouvel-Ontario Inc.	Sudbury	Ontario
Le Théâtre du Trident	Québec	Quebec
Le Théâtre français de Toronto	Toronto	Ontario
LE THÉÂTRE UBU INC.	Montréal	Quebec
Les Deux Mondes, cie de théâtre	Montréal	Quebec
Les Nuages en pantalon	Québec	Quebec

Les Productions de l'Étoile inc.	Caraquet	New Brunswick
Les Productions Ondinnok inc.	Montréal	Quebec
Les Sages Fous	Trois-Rivières	Quebec
Lillusion, Théâtre de marionnettes	Montréal	Quebec
Nouveau Théâtre Expérimental	Montréal	Quebec
Omnibus, le corps du théâtre	Montréal	Quebec
Orange Noyée	Montréal	Quebec
PLA'C'ART	Québec	Quebec
Playwrights Workshop Montréal	Montreal	Quebec
Productions À tour de rôle	Carleton-sur-mer	Quebec
Productions Hôtel-Motel	Montréal	Quebec
Productions pour Enfants de Québec	Québec	Quebec
Projet MÛ	Montréal	Quebec
Sibyllines	Montréal	Quebec
STO Union Theatre Co. Inc.	Wakefield	Quebec
Teesri Duniya Theatre	Montreal	Quebec
The Other Theatre/LAutre Théâtre	Montreal	Quebec
Théâtre Blanc	Québec	Quebec
Théâtre de la Bordée	Québec	Quebec
Théâtre de La Manufacture	Montréal	Quebec
Théâtre de la Petite Marée	Bonaventure	Quebec
Théâtre de la Pire Espèce	Montréal	Quebec
Théâtre de la Vieille 17	Ottawa	Ontario
Théâtre de l'Avant-Pays	Montréal	Quebec
Théâtre de l'Oeil Inc.	Montréal	Quebec
Théâtre de QuatSous inc.	Montréal	Quebec
THÉÂTRE DENISE-PELLETIER	Montréal	Quebec
Théâtre des Fonds de Tiroirs	Montréal	Quebec
Théâtre du Double signe	Sherbrooke	Quebec
Théâtre du Tandem	Rouyn-Noranda	Quebec
Théâtre du Trillium Inc.	Ottawa	Ontario
Théâtre Incliné	Laval	Quebec
Théâtre la Catapulte	Ottawa	Ontario
Théâtre la Seizième	Vancouver	British Columbia
Théâtre Le Clou	Montréal	Quebec
Théâtre les gens d'en bas	Rimouski	Quebec
Théâtre Magasin	Montréal	Quebec
Theatre Motus	Longueuil	Quebec
Théâtre Niveau Parking	Québec	Quebec
Théâtre Petit à Petit	Montréal	Quebec
Théâtre Pupulus Mordicus	Québec	Quebec

Théâtre Sortie de Secours	Québec	Quebec
Théâtre Urbi et Orbi	Montréal	Quebec
Théâtre Youtheatre Inc.	Montréal	Quebec
Trois Tristes Tigres inc.	Montréal	Quebec
Troupe du Jour inc.	Saskatoon	Saskatchewan
Ubus Théâtre	Sacré-Coeur	Quebec