

# Survey on the Future of Circus Arts

Envisioning the future to regain our momentum and outreach

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Results of a survey conducted among Canadian circus artists, cultural workers and organizations

October 2021

**en piste**

REGROUPEMENT NATIONAL DES ARTS DU CIRQUE  
NATIONAL CIRCUS ARTS ALLIANCE

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## Context and Objective

Due to the COVID-19 crisis, En Piste, the National Circus Arts Alliance, considers that representing the circus arts sector's interests is fundamental to supporting it during this crisis.

Since early summer of 2021, we have finally seen a gradual return to circus arts activities. Thus, this survey on the future of the circus arts will allow us to define our needs in order to not only envisage our future, but regain our momentum and outreach.

Data from a first survey conducted in April 2020 and a second one in November 2020 assessed the repercussions of the pandemic and its effects on the circus arts sector. This led to a one-time grant from the Government of Quebec totalling \$21.8 million for the circus arts. It also allowed us to advance our representation efforts with the federal government.

It will take months, if not years, to return to full functioning. This is why artists, cultural workers and circus organizations across Canada were once again asked to participate in a survey, the third, in order to:

- Update data on the pandemic's impacts to better represent those concerned with government partners;
- Identify their needs and perspectives;
- Support the circus arts sector so that it regains its full development potential and influence.

This survey was carried out in collaboration with Simon Bastien, who holds a master's degree in management science from HEC Montréal and over a 33-year career as a management consultant has overseen more than 1,000 projects, mainly in the fields of strategic planning, economic studies, marketing research and quality management.

## Methodology

### *Target populations*

*The survey universe focused on two target populations:*

- Individuals, mainly composed of cultural workers, artists, trainers, directors, designers, technicians, etc. The survey was sent to 1,040 individuals.
- Organizations, including creation companies or production agencies, schools, social circus organizations, presenters, festivals, etc. The survey was sent to 170 organizations.

### *Collection method and period*

The survey was conducted online. An email explaining the survey objectives was sent by En Piste to the two target populations. It included a link to access the survey. The respondent could complete the questionnaire in either French or English.

The collection period ran from September 8 to 29, 2021.

### *Participation rate and margin of error*

- In the case of individuals, 376 questionnaires were completed, for a participation rate of 36.2%. For reference, the margin of error is 4.0%.
- In the case of organizations, 81 questionnaires were completed, for a participation rate of 47.6%. For reference, the margin of error is 7.9%.

In total, 457 respondents took part in the survey. Note that these are high participation rates for an online survey. The margin of error is provided as a guide only, as theoretically it does not apply to online surveys, as these are not probabilistic.

## Highlights

### Survey of individuals<sup>1</sup>

#### *Profile*

- 78% responded to the survey in French, 86% reside in Quebec and 81% are Canadian citizens.
- 71% are artists; 35% trainers, instructors or coaches; 21% designers; 18% cultural workers and 9% technicians.

#### *Impact of the pandemic*

- 89% of respondents generated income in 2021, up from 2020 (82%)
- On average per respondent, total annual income rose from \$30,119 in 2020 to a projected \$31,271 in 2021, an increase of 4%.
- On average per respondent, annual revenues from the circus arts rose from \$16,253 in 2020 to a projected \$19,202 in 2021, up 18%. The portion of income relating to the circus arts within total income has therefore increased from 54% to 61%.
- For the same period, circus arts revenues generated in Canada increased on average from \$12,709 to \$15,883 (25% increase), those generated outside Canada increased from \$2,190 to \$2,367 (8% increase), while those generated online fell from \$1,354 to \$952 (30% decrease).

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<sup>1</sup> Tables depicting the full results are presented in Appendix 1 of this document.

- Since the start of COVID-19 in March 2020, income from the circus arts has fallen from \$22,750 at the end of 2020 (average per respondent) to a forecast of \$29,761 at the end of 2021, up 30%.
- At the time of the survey, a very large majority of respondents, 92%, had experienced at least some resumption of their circus arts activities: 20% a total resumption, 32% a resumption of at least 50% and 40% a recovery of less than 50% of activities.
- At the time of the survey, a very large majority of respondents, 90%, were still suffering from negative repercussions of the pandemic.
- Among these repercussions, the most important are: the cancellation or postponement of an artistic project (research, creation, residency, tour, etc.) (72%), the inability to fully exercise one's profession in the circus arts because the respondent has to work in another field to earn a living (cumulation of jobs) (50%), salary reduction (44%), depression and anxiety (43%), and inability to exercise the circus arts profession fully because the stoppage of training and shows caused physical or psychological problems in the respondent (39%).
- If the losses and negative repercussions suffered since the start of the pandemic do not seem to have endangered the ability of the majority of respondents to continue their professional activities in the circus arts sector, the impacts are nevertheless major: 1% have left the sector for good, 12% have put their careers on hold and started a career transition, 31% may be—however reluctantly—considering leaving the circus arts sector, 40% have changed nothing and 14% do not know.

### ***Opportunities and transition***

- 46% of respondents returned to school or developed professional skills in the circus arts when activities ceased during the pandemic. Of these, 59% chose a field of study or professional skills directly related to the circus arts, 9% in an artistic discipline other than the circus arts (but which may be related) and 32% in a sector other than the arts with a view to changing careers.
- 58% of respondents developed new artistic projects in the field of circus arts when activities ceased during the pandemic. Of these, 52% have done research and artistic creation (mostly for a new show), 24% have perfected or mastered another circus arts discipline or a related one and 18% created a digital project (virtual show, video, capsule).
- Among the new activities that respondents have carried out or had to undertake since the start of the pandemic, most important were: the creation of a new show or number (53%), a creative residency (31%), teaching or coaching (28%) and the development of a digital and/or audiovisual project (20%).

### ***Envisioning our future***

- As primary needs to regain their pre-pandemic professional momentum, the respondents mention: access to free or very low-cost training venues (56%), access to a research or creation grant (46%), access to an extended salary benefit from

now until circus arts sector activities return to normal (43%) and access to a venue for creation (42%).

- In terms of respondents' interest in digital development<sup>2</sup>, four aspects stand out: live performance broadcasting and sales (41% have a *strong interest* and 27% have *some interest*), management training (33% and 39%), recording a show or number (25% and 45%) and creation and distribution of shows or hybrid numbers (in-person and online) (25% and 46%).
- In addition to access to financing, the main needs expressed by respondents to face the challenges of digital development are: training for the acquisition of the necessary skills (metadata, marketing, artificial intelligence, etc.) (35%), the acquisition of computer and digital hardware and equipment (32%), access to digital experts (27%) and access to online services for artists and industry professionals (27%).
- According to respondents, the most important priorities for the circus arts sector to regain its momentum are: access to a social safety net for self-employed artists and workers (70%), access to more venues for hosting residencies and circus shows (67%), access to more funding to support research and creation (60%), access to more specialized venues for circus education, training and the creation of shows (58%) and increased financial support to creative companies, presenters, festivals and social circus organizations so that they can hire artists and staff (58%).

## **Survey of organizations<sup>3</sup>**

### ***Profile***

- 72% responded to the survey in French and 81% are located in Quebec.
- 48% are a creation company or production agency, 30% a school, 22% a social circus organization and 12% a presenter or festival.

### ***Impact of the pandemic***

- 86% of responding organizations generated revenue in 2021, more than in 2020 (82%).
- On average per responding organization, total revenue fell from \$1,663,646 for the fiscal year ended in 2020 to a forecast of \$1,371,390 for the fiscal year ended in 2021, a decrease of 18%.
- For the same period, total revenue generated in Canada fell on average from \$1,537,129 to \$1,261,313 (down 18%), while total revenue from outside Canada fell from \$111,749 to \$44,758 (60% decrease) while that generated online went from \$14,768 to \$65,319 (342% increase). The portion of total revenue earned online has increased from 1% to 5%.

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<sup>2</sup> The subject of digital development was addressed for the first time in this survey.

<sup>3</sup> Tables depicting the full results are presented in Appendix 2 of this document.

- Also, during the same period own-source revenue, excluding donations and sponsorships, fell from \$697,346 to \$433,629 (38% decrease), donations and sponsorships fell from \$113,817 to \$69,363 (39% decrease) while grant revenues increased from \$852,483 to \$868,398 (2% increase). The portion of own-source revenue (excluding donations and sponsorships) in total revenue rose from 42% to 32%, while the portion from grants rose from 51% to 63%.
- In the context of the pandemic, 43% of respondents received additional financial assistance from the Canada Council for the Arts or Department of Canadian Heritage, for an average amount of \$110,787.
- Among organizations headquartered in Quebec, 35% received \$21.8 million in financial assistance from the Government of Quebec, for an average amount of \$427,563, half having received \$100,000 or less). Among those headquartered outside Quebec, 18% received financial assistance from their provincial arts council or their provincial ministry of culture, for an average amount of \$54,833.
- On average per responding organization, the number of spectators reached fell from 8,704 for the fiscal year ended in 2020 to a forecast of 7,995 for the fiscal year ended in 2021, a decrease of 8%.
- For the same period, the number of spectators reached in Canada fell on average from 7,020 to 6,240 (decrease of 11%), the number of those reached outside Canada increased from 365 to 386 (increase of 6%) while the number of those reached online rose from 1,319 to 1,369 (up 4%). The share of spectators outside of Canada increased from 81% to 78%.
- For the same period, the average number of participants engaged in educational programs or activities (educational establishments or social circus companies) fell from 528 to 392 (down 26%).
- On average per responding organization, the total number of employees rose from 20.1 for the fiscal year ended in 2020 to a forecast of 25.9 for the fiscal year ended in 2021, an increase of 29%. The number of permanent employees increased from 6.2 to 7.5 (increase of 21%) while the number of casual employees increased from 13.9 to 18.4 (increase of 32%).
- At the time of the survey, almost all respondents, 95%, were still experiencing negative repercussions from the pandemic.
- The most important repercussions are: the cancellation, postponement or modification of activities relating to the mission (93%); reduction of activities to compensate for loss of income (53%); loss of expertise and skills (45%); a decrease in the number of employees and the reorganization of work (43%); work overload due to the decreased number of employees (43%) and departures due to change of career (43%).

### ***Opportunities and transition***

- If the recovery continues, 29% of respondents estimate that it will take 1 year for activities and the financial situation to return to the pre-pandemic level, 25% estimate that it will take 2 years and 19% that it will take 3 years (27% do not know).
- In the event of another pandemic wave causing a full or partial cessation of activities, 48% of respondents plan to maintain or reduce their activities, 37% plan to cease activities without shutting down and 13% will cease activity by closing.
- Among the new actions undertaken by respondents to maintain their activities during the pandemic, most notable are: online training activities (39%); the creation of a new show (39%); participation in seminars, conferences or consultations in order to develop their network (38%); online broadcasting and events (35%); participation in a film or a recording of a show (33%) and the development of a new digital project (33%).

### ***Envisioning our future***

- As to what is most needed to regain their momentum and pre-pandemic reach, the responding organizations mention: financial assistance aimed at the organization's operation or mission (84%); financial assistance for the creation, production or resumption of a show (54%); investments in the acquisition of apparatus and equipment (39%) and employability assistance or human resources consulting services to deal with the labour shortage and new issues (diversity, inclusion, harassment, etc.) (34%).
- In terms of respondents' interest in digital axes of development,<sup>4</sup> four aspects are most important: strengthening business management (accounting support, tour management, marketing, etc.) (49% have a *strong interest* and 35% *some interest*), distribution and sale of live performances (39% and 35%), creation and distribution of video clips (35% and 42%) and development of digital mediation tools in circus arts (34% and 42%).
- In addition to access to funding, the main needs expressed by respondents to face the challenges of digital development are: training to acquire the necessary skills (metadata, marketing, artificial intelligence, etc.) (43%), the acquisition of IT and digital devices and equipment (34%), the development of digital creation projects or the integration of digital into creative works (31%) and the recruitment of digital experts (30%).
- Disseminating content online is seldom lucrative. In fact, 38% of respondents distributed content for free, 13% did not recoup the cost of producing a for-fee digital work, 12% partially recouped it and 3% completely recouped it. 34% did not disseminate any content online.
- According to the responding organizations, the major priorities for the circus arts sector to regain its momentum are: increased financial support for creative companies, presenters, festivals and social circus organizations so that they can hire artists and staff (62%), access to more venues for hosting residencies and

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<sup>4</sup> The subject of digital development was addressed for the first time in this survey.



circus shows (58%); access to a social safety net for self-employed artists and workers (57%); access to more funding to support research and creation (53%) and access to more specialized circus venues for instruction, training and the creation of shows (51%).

## Conclusion

This survey is the third that addresses the pandemic's repercussions and effects on the circus arts sector; the first was conducted in April 2020 and the second in November 2020. This latest study also discusses the opportunities presented by the pandemic and the transition to the post-pandemic reality. It also enabled organizations and individuals to project themselves into the future and identify their needs so that the sector may regain its momentum and outreach.

This three-step consultation exercise with players in the circus arts sector enabled the community to mobilize. The very high participation rate in the current survey context—around 50% among organizations and between 36% and 53% for individuals (according to the survey)—demonstrate a keen interest in ensuring the sector's recovery and a desire to testify as to their current reality and future needs.

The results of this third survey, with the added perspective of the two previous, show unequivocally that the negative impacts of the pandemic, most severe in 2020, are still very present in 2021, both for organizations (95%) and for individuals (90%). Here are the main conclusions that emerge.

### *Organizations*

- The financial situation of organizations remains fragile, and no significant improvement is observed in 2021.
  - After declining on average by 51% in 2020 compared to 2019, their total revenue continued to decline in 2021 (-18%).
  - Export revenues are reduced to almost nothing. After dropping considerably in 2020 and then again in 2021, they now represent only 3% of total income. The development of export markets must therefore be recommenced.
  - If organizations have been able to maintain a certain level of total revenue, it is mainly thanks to grants, the percentage of which rose from 51% in 2020 to 63% in 2021.
- The public funding system is much less developed outside Quebec than in that province. Compared to those with a head office in Quebec, organizations whose head office is located outside Quebec are half as likely to have received assistance from their province's arts council or culture ministry and the average amount received is eight times less.
- The one-time grant of \$21.8 million for the circus arts bestowed in 2020 and 2021 by the Government of Quebec has been beneficial. Note, however, that only 35%

of organizations with a head office in Quebec received financial assistance, which amounts to \$100,000 or less for half of them.

- Digital technology has become increasingly important in the functioning of organizations.
  - Although online revenue increased sharply in 2021, it remains rather marginal and unprofitable: 17% of viewers reached are online, but this represents less than 5% of income. Just over a quarter of organizations delivered paid content online and only half of them were able to recoup their production costs fully or partially.
  - The large majority of organizations express an interest in digital development; however, to face the challenges that this development represents, they need training to acquire the necessary skills.
- There is no clear vision for the revival of the circus arts sector, largely because of a still very present uncertainty about the future: a scant three out of ten organizations predict that their activities and financial situations will return to pre-pandemic levels within a year.
- When asked to imagine the future of the circus arts, organizations instead express needs for basic financial assistance: operations and mission, training, hiring of staff, venues, production or resumption of a show, equipment acquisition, etc. These results show that organizations are more preoccupied with their survival than focused on new methods of creating or developing markets.

### *Individuals*

- The degree of precariousness individuals face has not diminished, and the uncertainty affects them strongly:
  - Their financial situation remains very fragile. Since the start of the pandemic, lost circus arts income will have increased by 30% by the end of 2021 compared to the end of 2020, and nearly half have suffered a cut in wages.
  - Three-quarters of people still experience cancellation or postponement of artistic projects, half are unable to fully exercise their profession in the circus arts, and nearly half suffer from depression or anxiety.
- The future of individuals in the circus arts sector also remains uncertain:
  - Almost one-in-two respondents reluctantly thinks about leaving the circus arts industry, has put their career on hold, or has left the industry for good.
  - Less than half returned to school or developed professional skills during the pandemic, but a third of them are in a sector totally other than the circus arts.
- As with organizations, digital technology has taken on importance for individuals, though it was negligible a year ago.
  - On the other hand, revenues related to the circus arts and made online only account for a very small share of total revenues (only 5%).

- A fairly large majority of individuals express an interest in digital development. And to face the challenges of this development, they need to acquire the necessary skills as well as apparatus and equipment.
- Like organizations, individuals find it difficult to imagine the circus arts' future. Instead, they express basic needs such as a social safety net or extended wage benefits, training venues, training and dissemination, subsidies or funding for research or creation, etc. These results illustrate both the precarious situation experienced by artists and other workers in the circus arts sector and the difficulty they have in projecting themselves into the future.

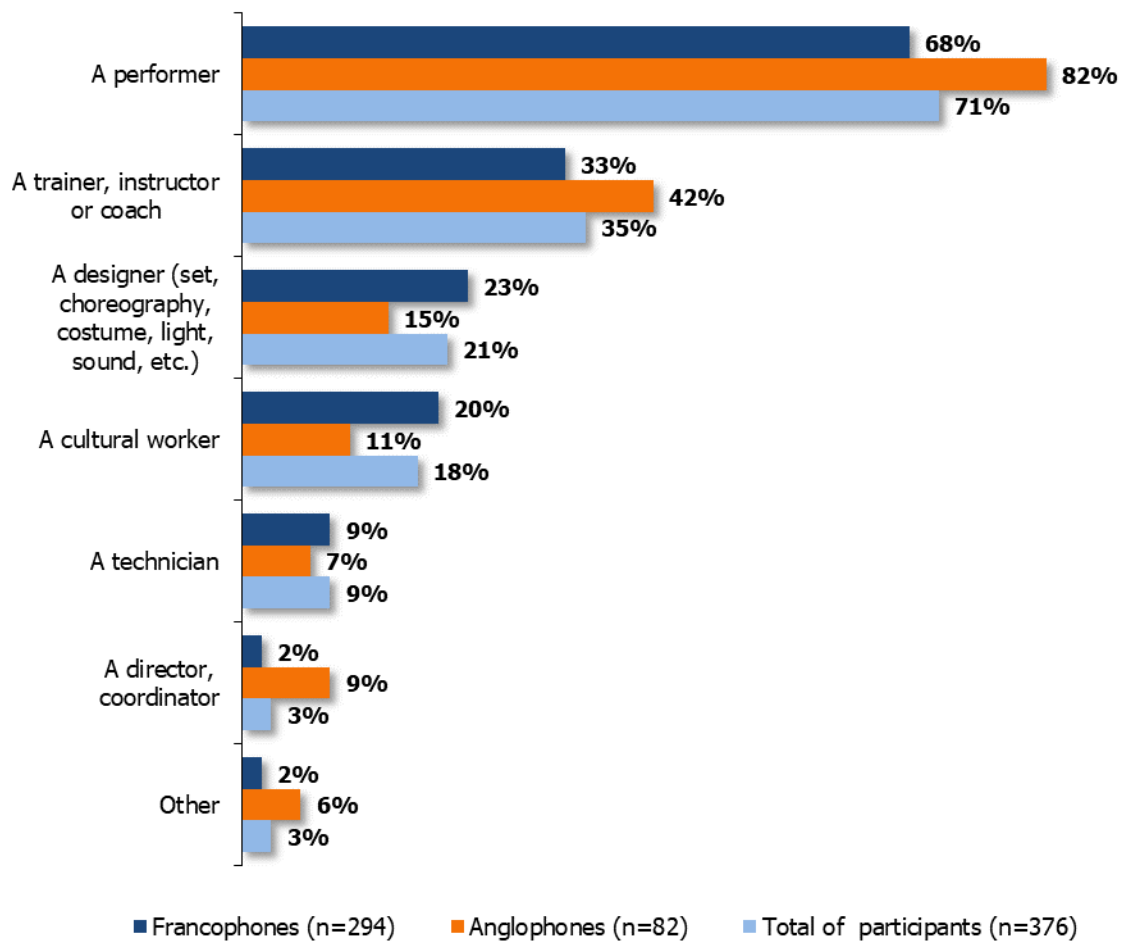
The circus arts sector managed to survive during the pandemic. Both organizations and individuals have shown resilience, but they are far from having arrived at the end of this ordeal. The fragile state of organizations and the precariousness of individuals remains a concern, just as prevalent at the end of 2021 as it was the previous year. Financial assistance and employability measures are therefore still essential to ensure the survival and revival of organizations, but also to counter the precariousness of artists and other workers in the circus sector.

This survey defines our needs to envision our future, which must ensure that we build a next generation in order to compensate for recent and upcoming departures in the short and medium term. Finally, this survey on the future of the circus arts allows us to both establish the most urgent needs and identify the essential resources to regain our momentum and our outreach.

## Appendix 1: Survey of artists and cultural workers

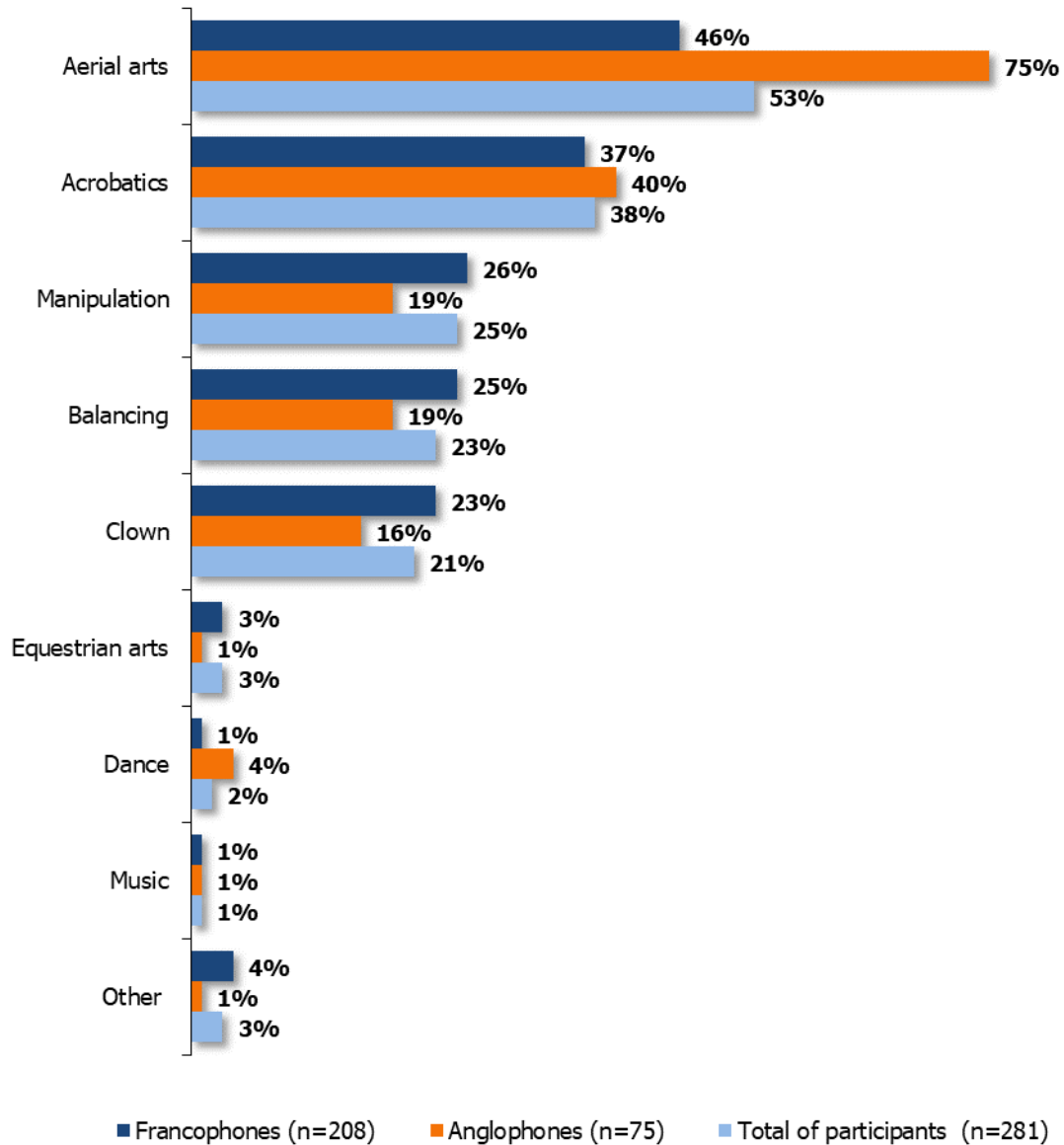
Q1 You are: (Tick all boxes that apply)

Figure 1—Occupation



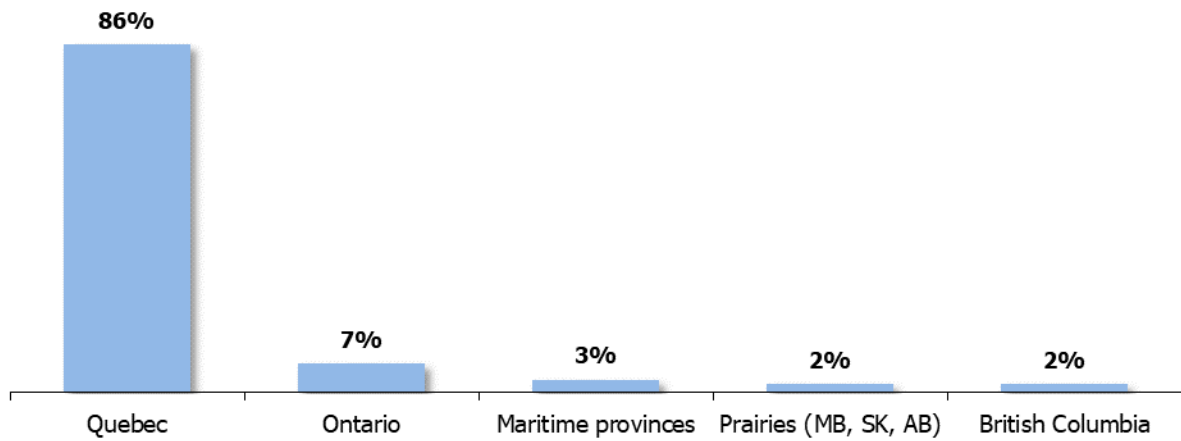
## Q2 If you are a circus artist, your main disciplines are:

Figure 2—Artists' Main Disciplines

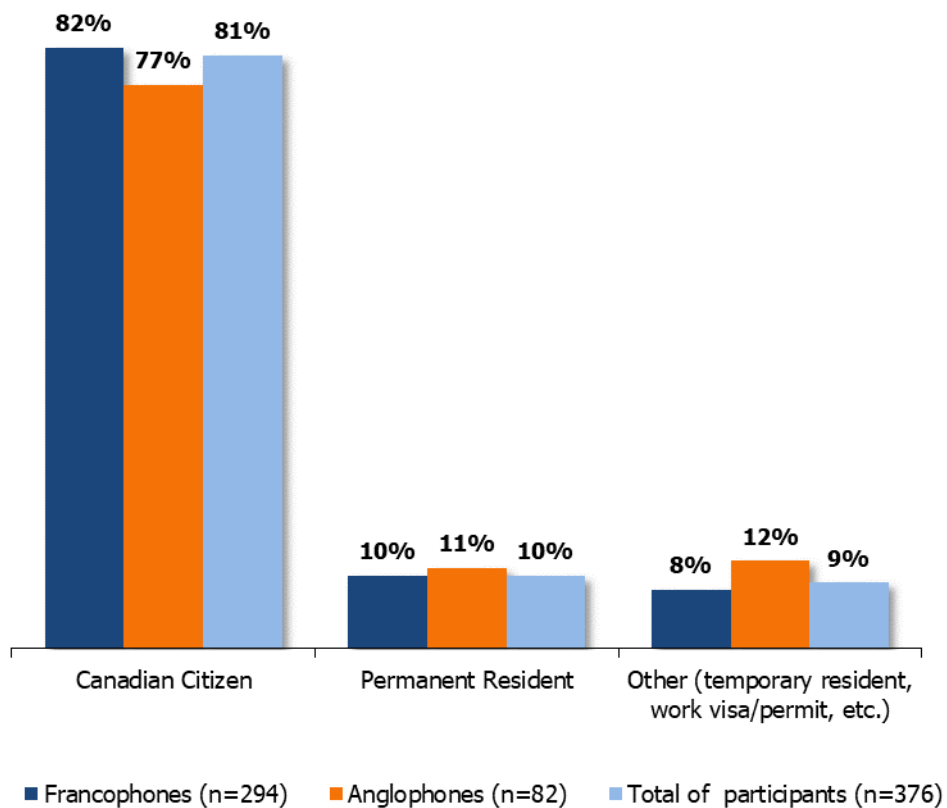


### Q3 In which province or territory do you reside?

Figure 3—Province of Residence (n=376)



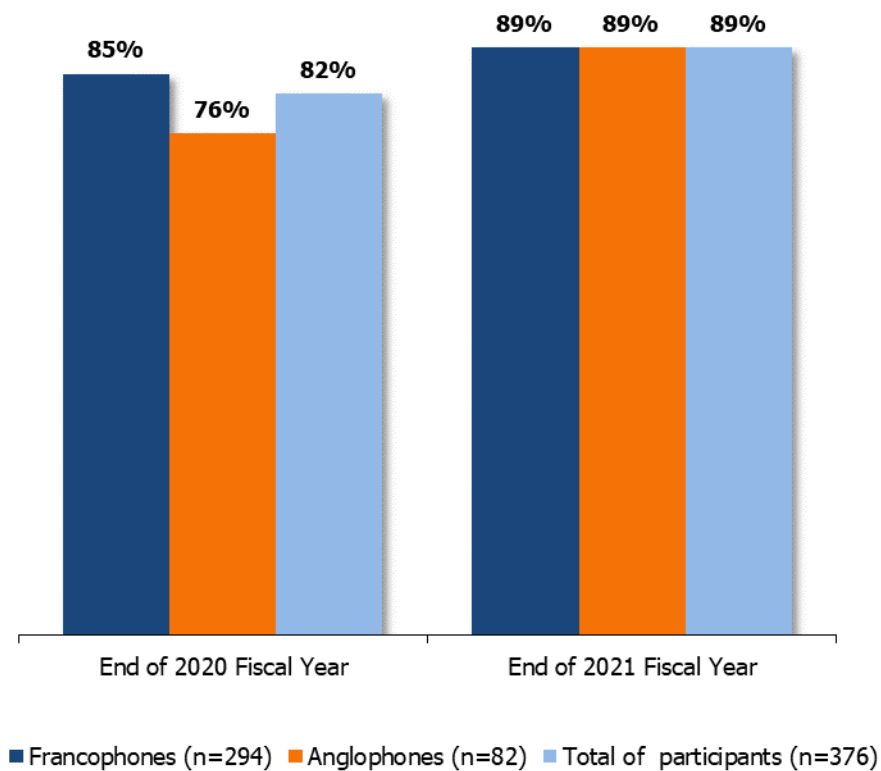
### Q4 You are:



**Q5 Did you generate any income during the fiscal year ended 2020?**

**Q6 Did you or will you generate any income during the fiscal year ended 2021 (estimated)?**

**Figure 5–2020 and 2021 Income Generated (% of Yes)**

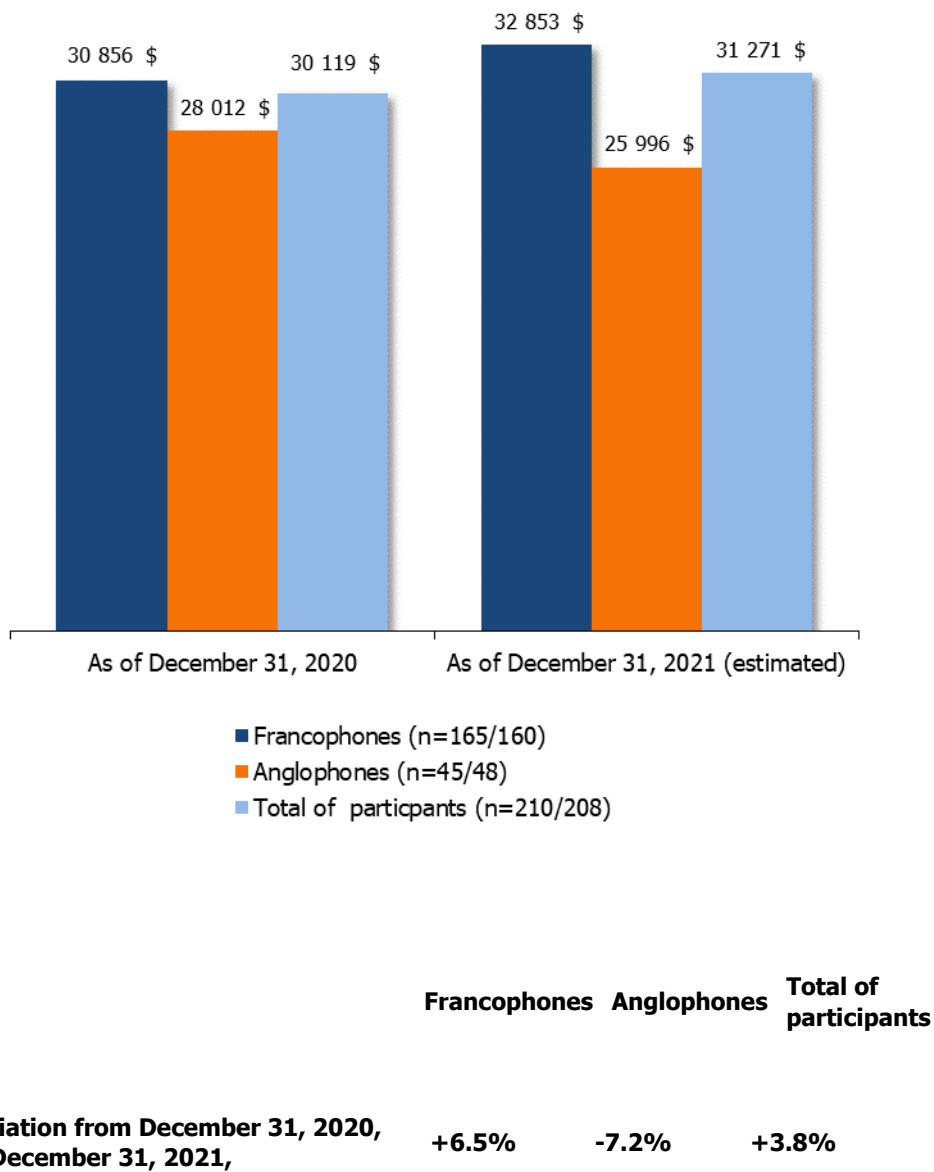


**Q7 What is your total annual income (in CAN \$)?**

**As of December 31, 2020**

**As of December 31, 2021 (estimated)**

**Figure 6—Total Annual Income: Average per Participant**



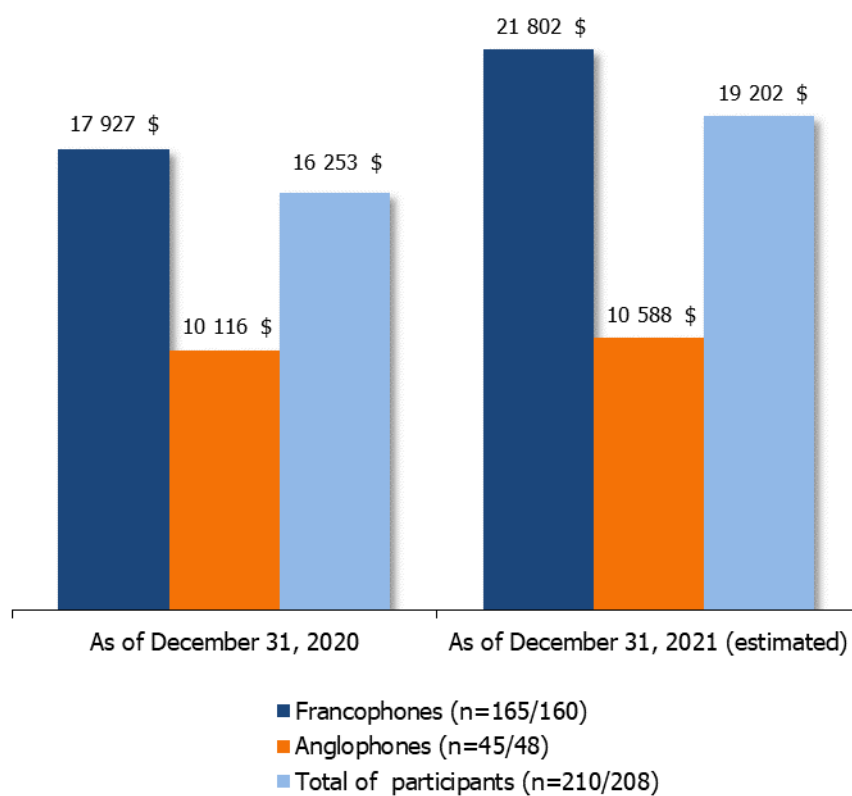


**Q8 What is your annual income related to your professional circus arts activities (in CAN \$)?**

**As of December 31, 2020**

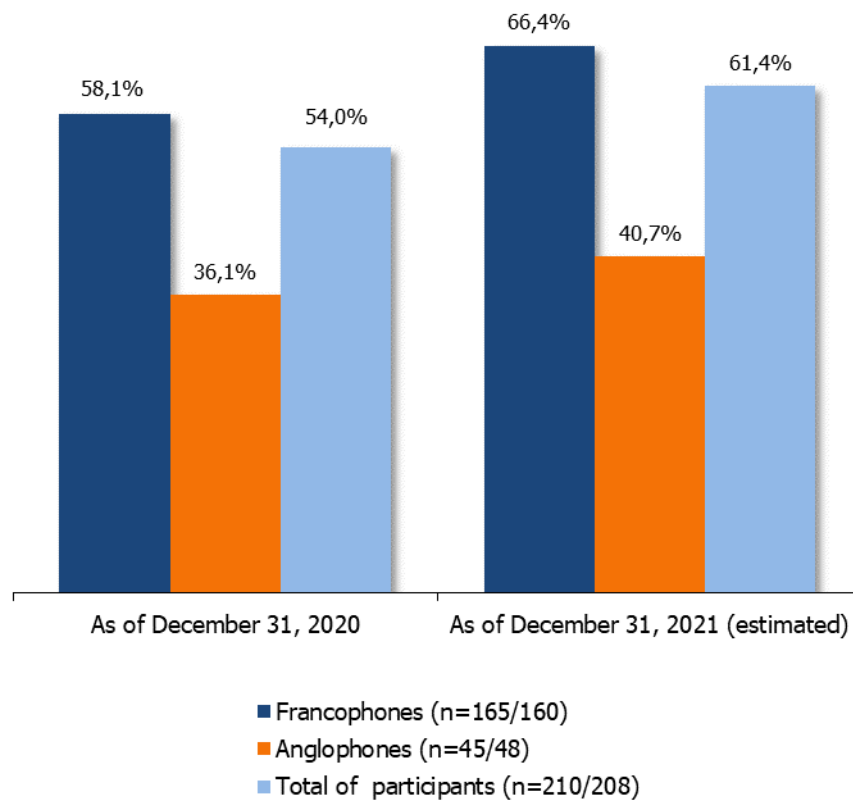
**As of December 31, 2021 (estimated)**

**Figure 7—Annual Circus Revenues: Average per Participant**



	Francophones	Anglophones	Total of participants
<b>Variation from December 31, 2020, to December 31, 2021,</b>	<b>+21.6%</b>	<b>+4.7%</b>	<b>+18.1%</b>

**Figure 8—Ratio of Annual Circus Revenues/Total Annual Income: Average per Participant**



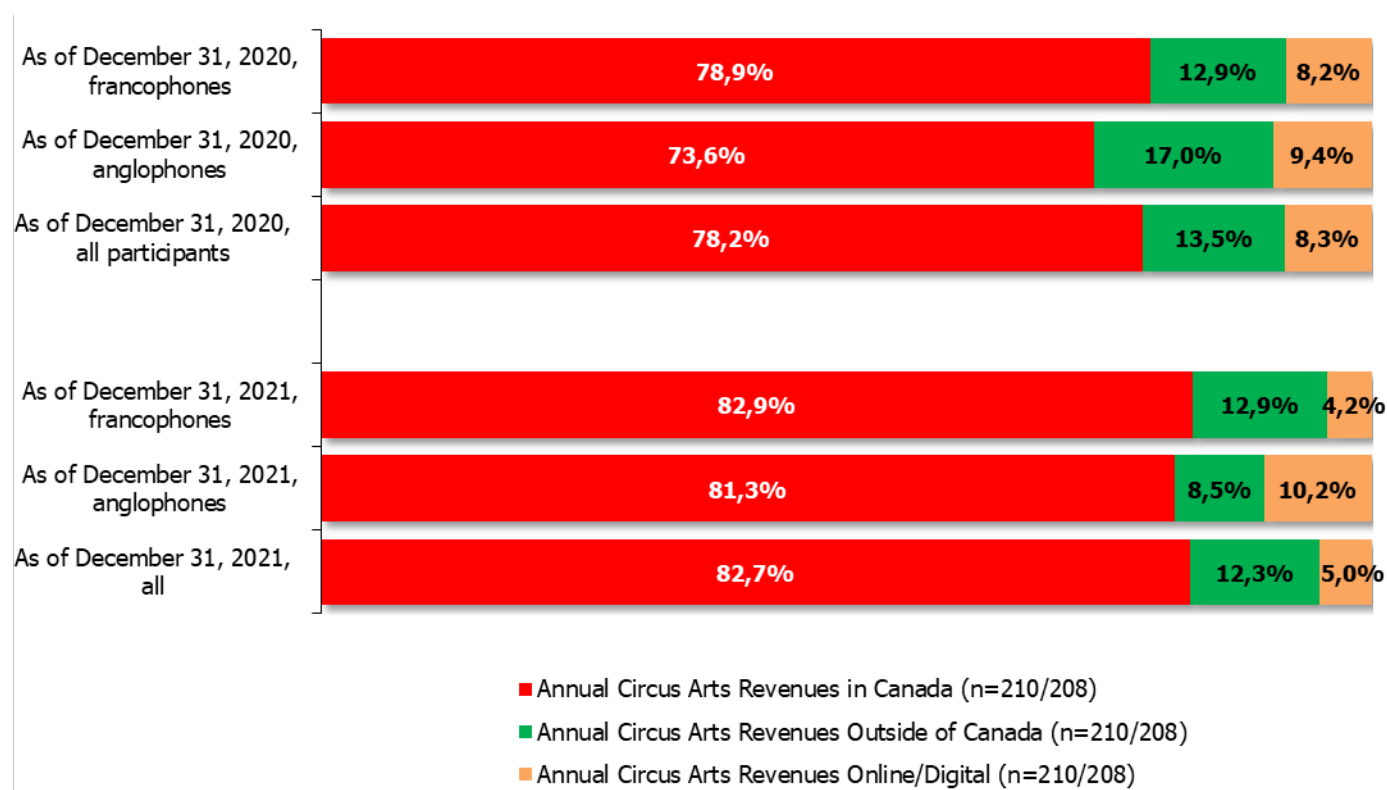
	Francophones	Anglophones	Total of participants
<b>Variation from December 31, 2020, to December 31, 2021 (in percentage points)</b>	<b>+8.3 points</b>	<b>+4.5 points</b>	<b>+7.4 points</b>

## Q9 Please break down your annual income related to your professional circus arts activities according to the territory and online

For the fiscal year ended 2020

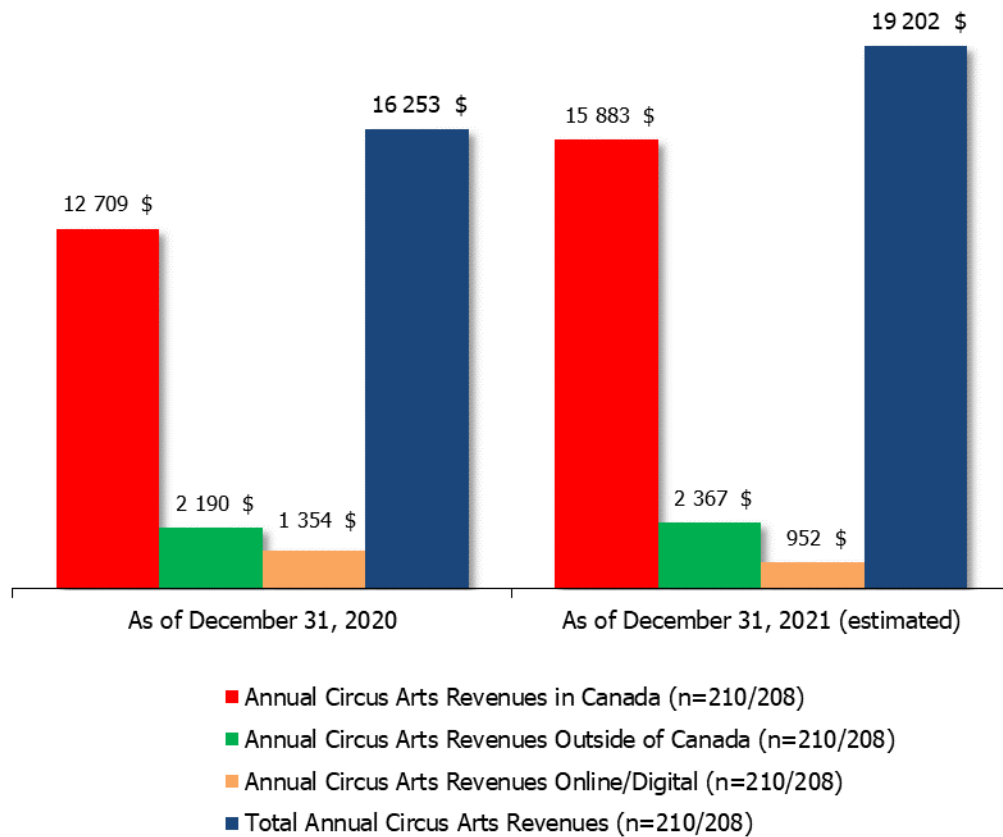
For the current fiscal year (estimated)

Figure 9—Annual Circus Arts Revenues in Canada, Outside of Canada and Online/Digital



Variation from 2020 to 2021 (in percentage points)	In Canada	Outside of Canada	Online/Digital
Francophones	+4.0 points	0 point	-4.0 points
Anglophones	+7.7 points	-8.5 points	+0.8 point
All participants	+4.5 points	-1.2 point	-3.3 points

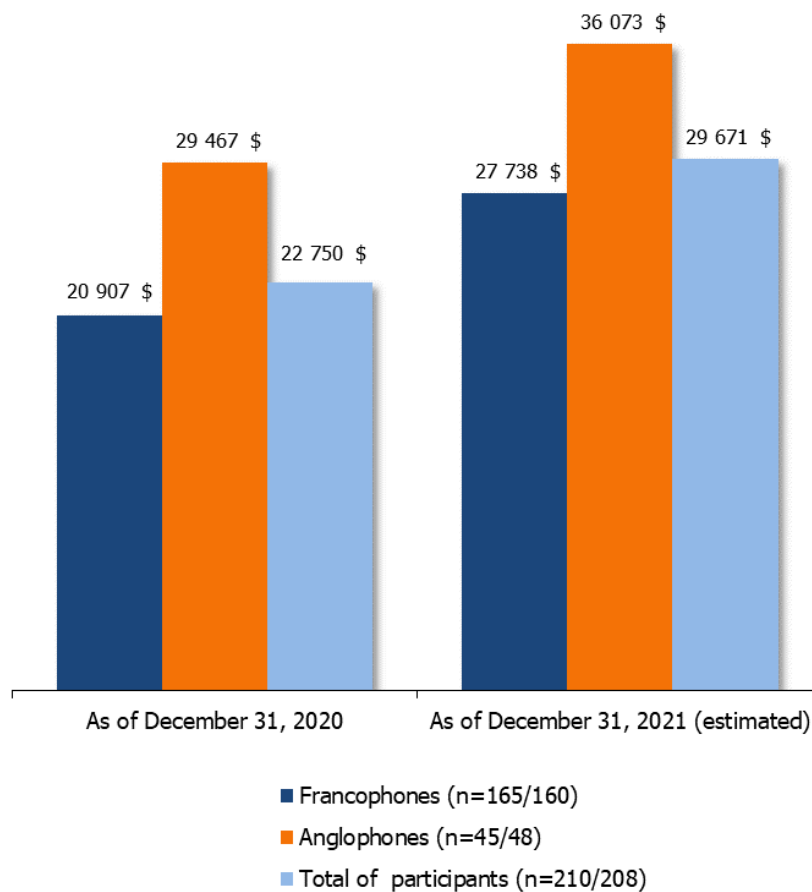
**Figure 10—Annual Circus Arts Revenues in Canada, Outside of Canada, Online/Digital and Totals: Average per Participant**



	Annual Circus Arts Revenues in Canada	Annual Circus Arts Revenues Outside of Canada	Annual Circus Arts Revenues Online/Digital	Total Annual Circus Arts Revenues
<b>Variation from December 31, 2020, to December 31, 2021,</b>	<b>+25.0%</b>	<b>+8.1%</b>	<b>-29.7%</b>	<b>+18.1%</b>

**Q10 What is your estimated loss of income related to the circus arts since the beginning of the COVID-19 pandemic in March 2020?**

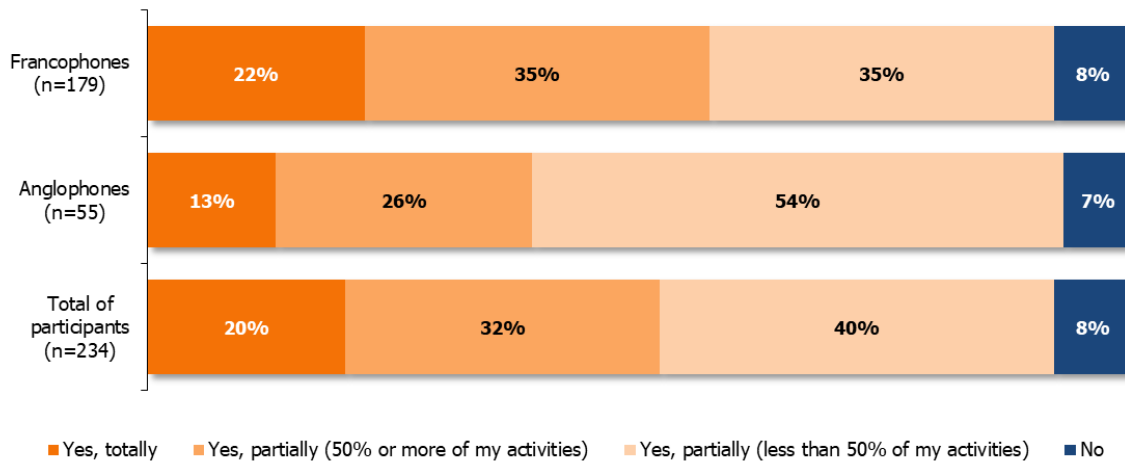
**Figure 11—Estimated Loss of Income Related to the Circus Arts since the Beginning of the COVID-19 Pandemic in March 2020: Average per Participant**



	Francophones	Anglophones	Total of participants
<b>Variation from December 31, 2020, to December 31, 2021,</b>	<b>+32.7%</b>	<b>+22.4%</b>	<b>+30.4%</b>

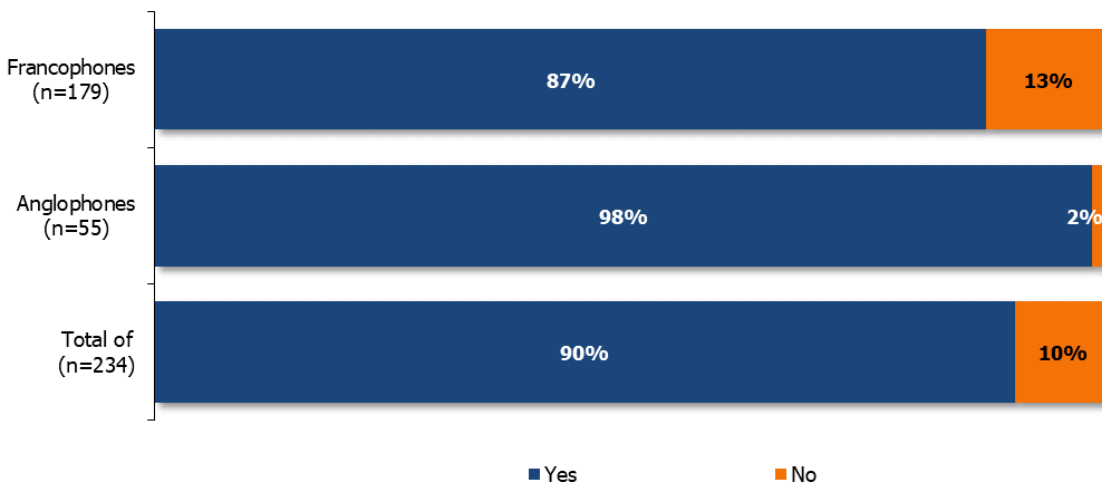
## Q11 As of today (August 2021), have you resumed your circus arts activities?

Figure 12—Resumption of Circus Arts Activities, As of August 2021



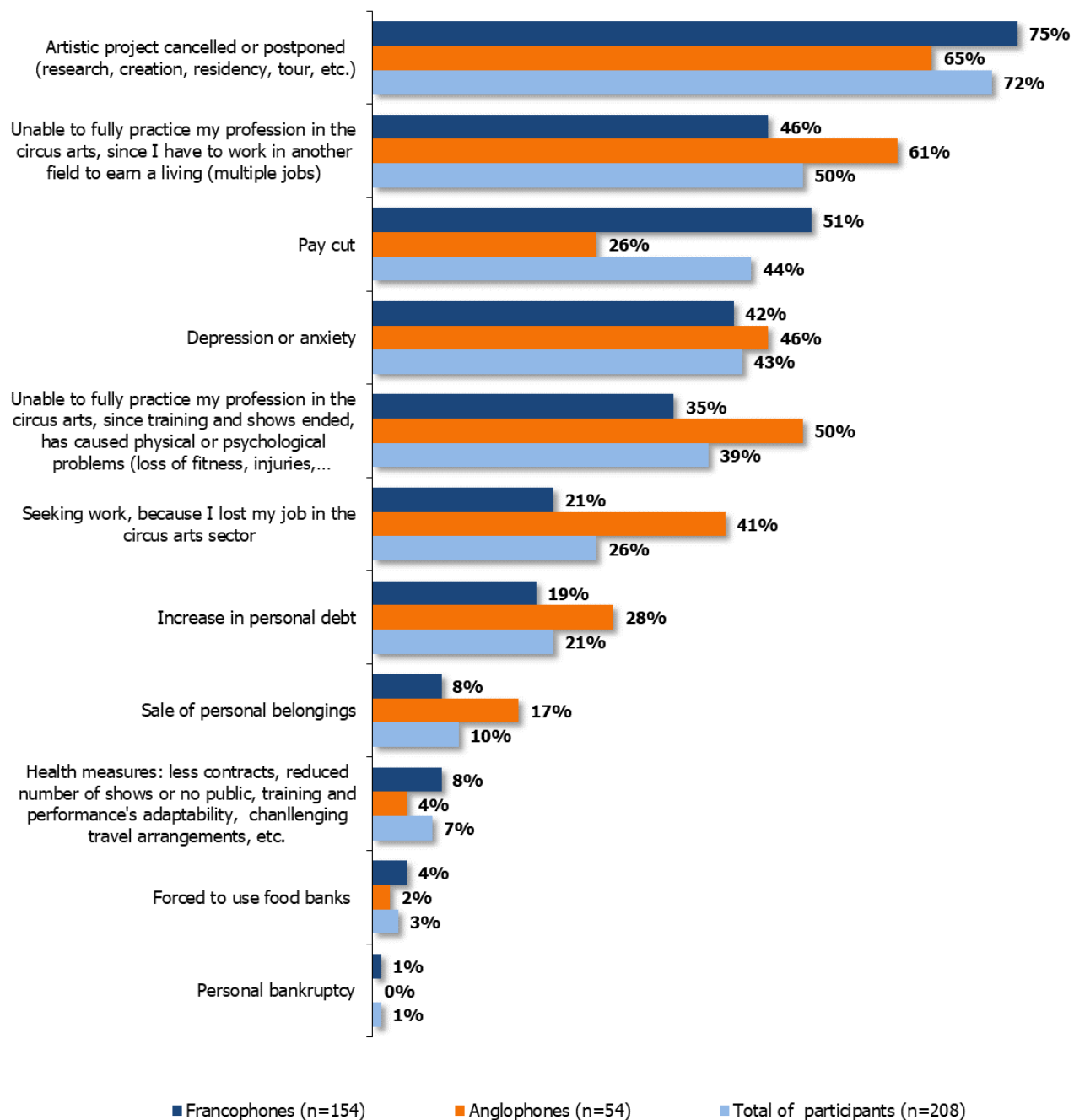
## Q12 As of today (August 2021), are you still being negatively impacted by the pandemic?

Figure 13—Negative Impacts of the Pandemic Still Being Experienced, As of August 2021



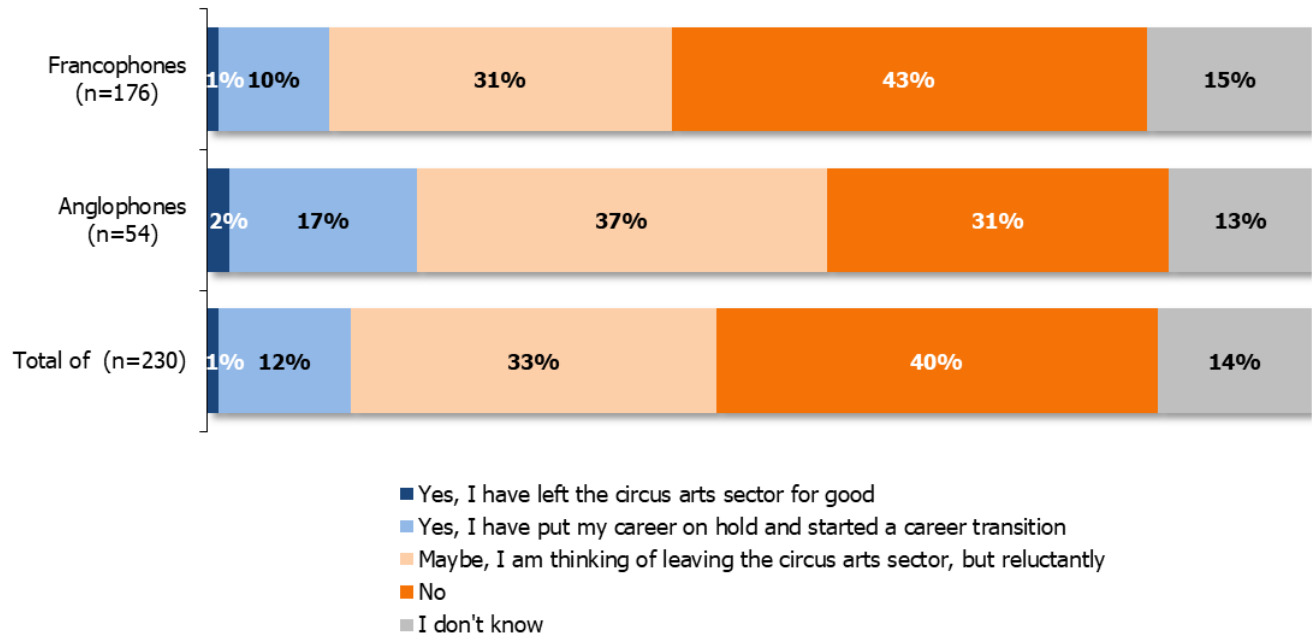
**Q13 (If Yes to Q12) What negative impacts are you experiencing? Check all that apply.**

**Figure 14—Most Important Pandemic Impacts**



**Q14 Have the losses incurred or negative impacts experienced since the beginning of the pandemic jeopardized your ability to continue your professional activities in the circus arts sector?**

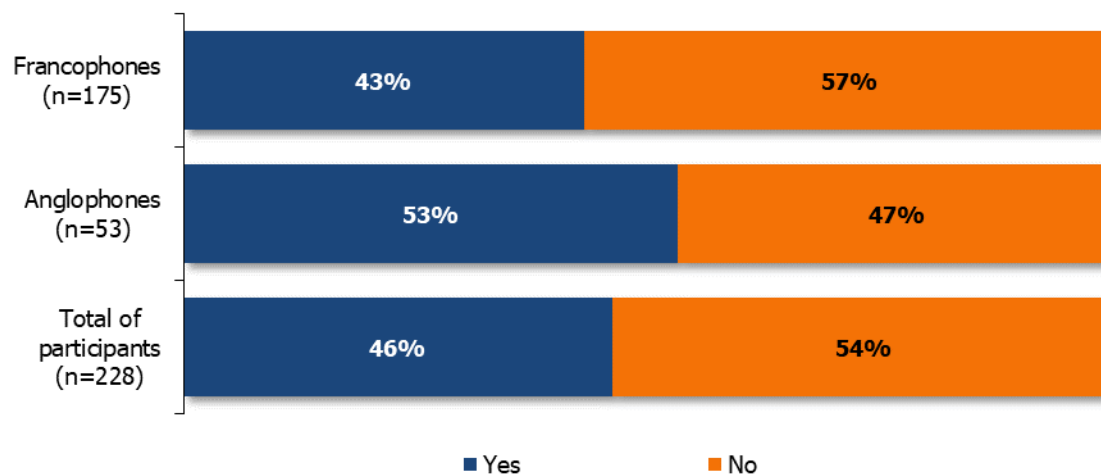
**Figure 15—Ability to Continue Working in the Circus Arts Sector Jeopardized Due to Financial Losses and Negative Impacts Experienced Since the Beginning of the Pandemic**





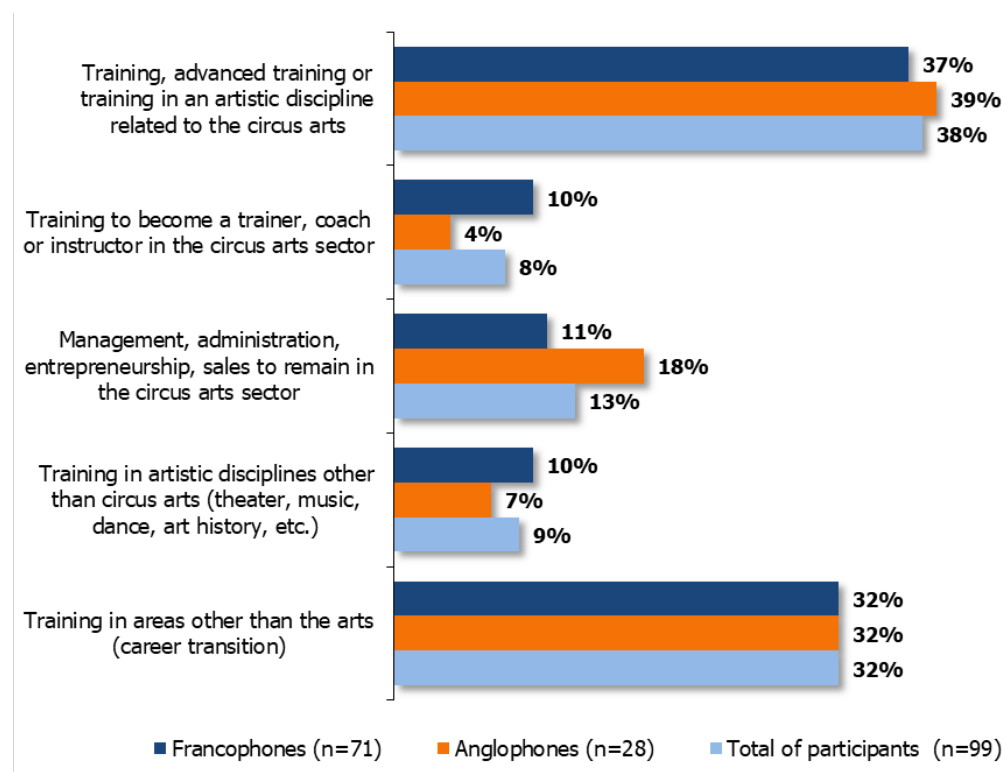
## Q15 Have you taken advantage of the cessation of activities during the pandemic to go back to school or develop professional skills in the circus arts field?

Figure 16—Return to School or Professional Skills Development in the Circus Arts Field Due to the End of Activities during the Pandemic



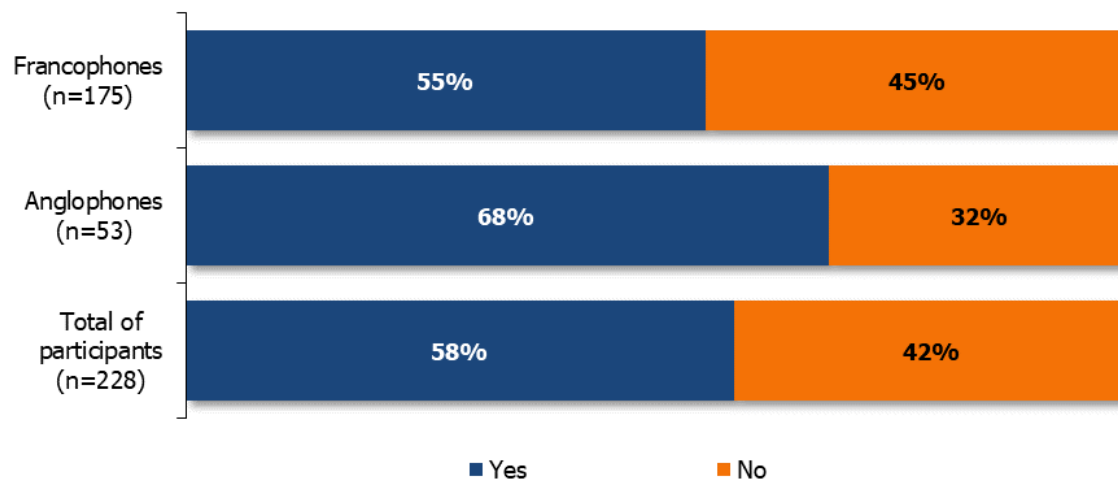
## Q15A If yes, what type of studies or professional skills?

Figure 17—Types of professional training or skills developed



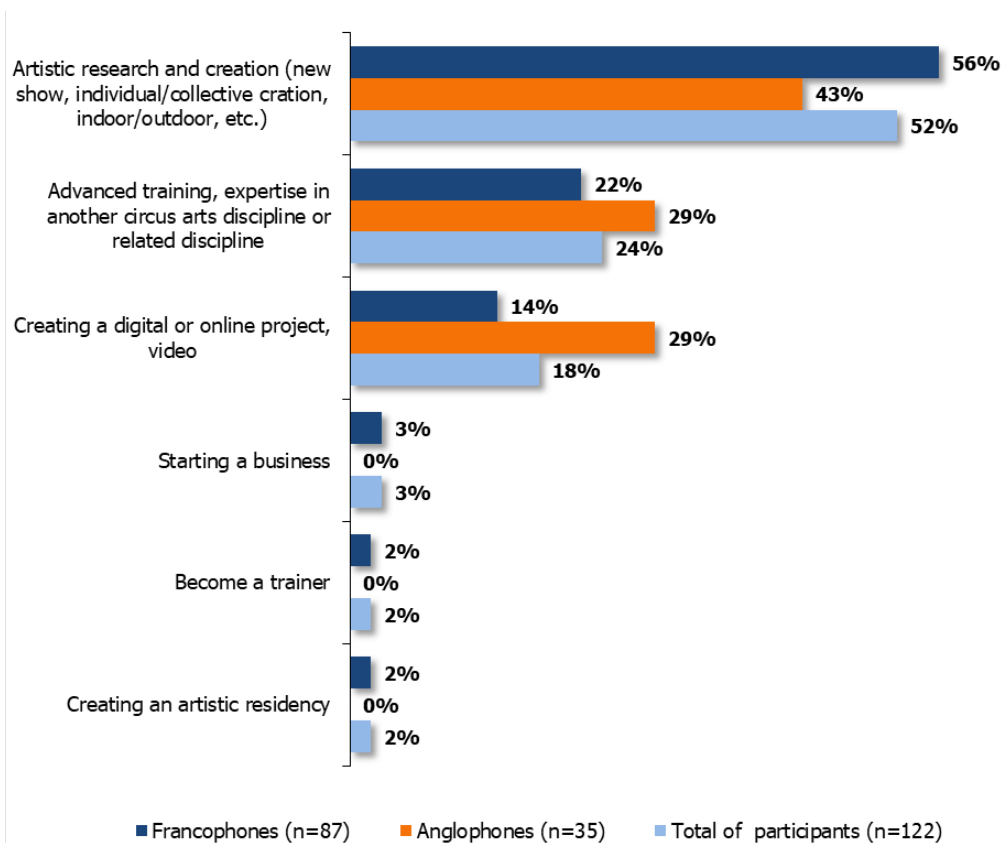
## Q16 Have you taken advantage of the cessation of activities during the pandemic to develop new artistic projects in the circus arts field?

Figure 18—New Artistic Projects Development in the Circus Arts Field throughout the End of Activities during the Pandemic

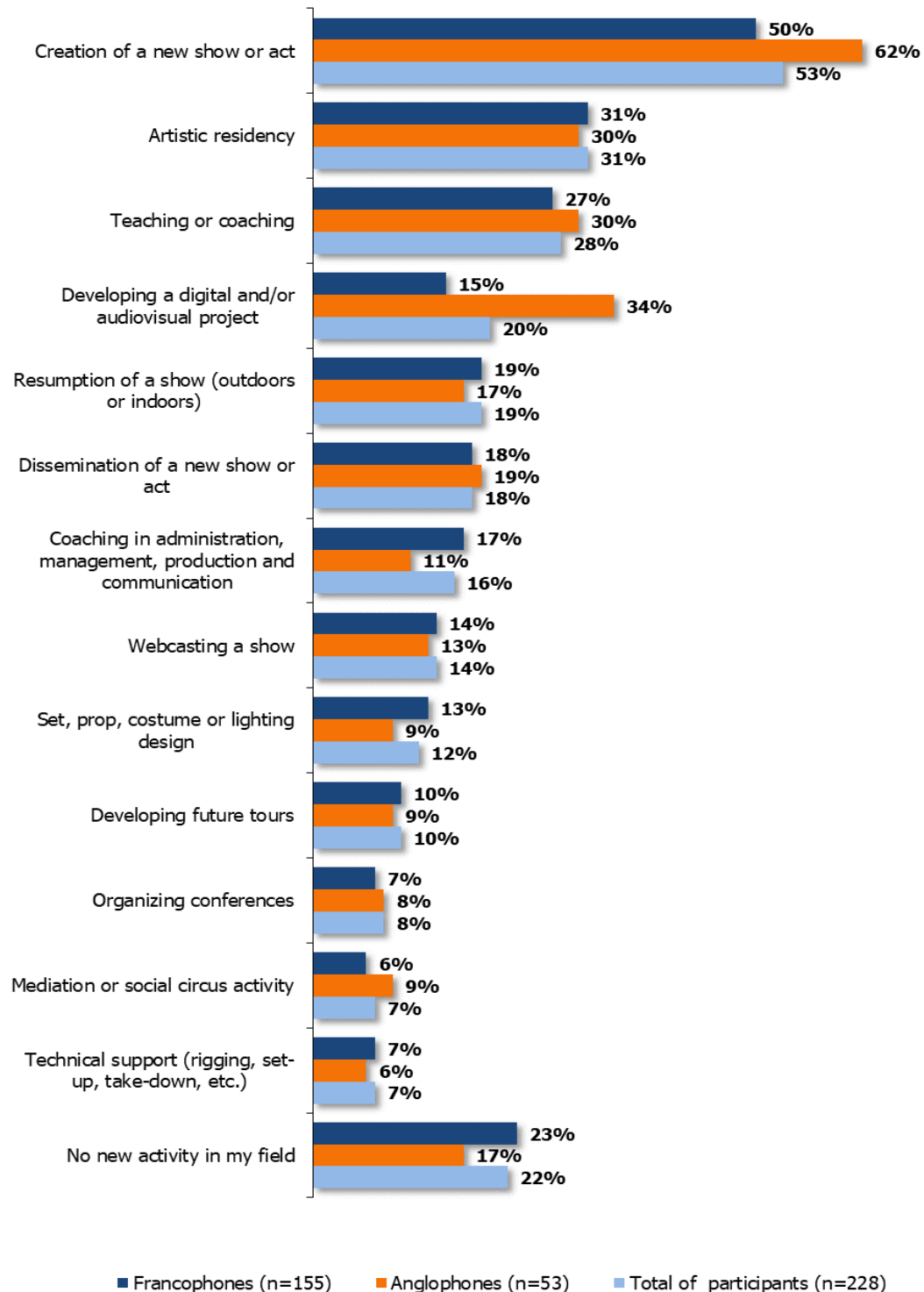


## Q16A If yes, what type(s) of projects?

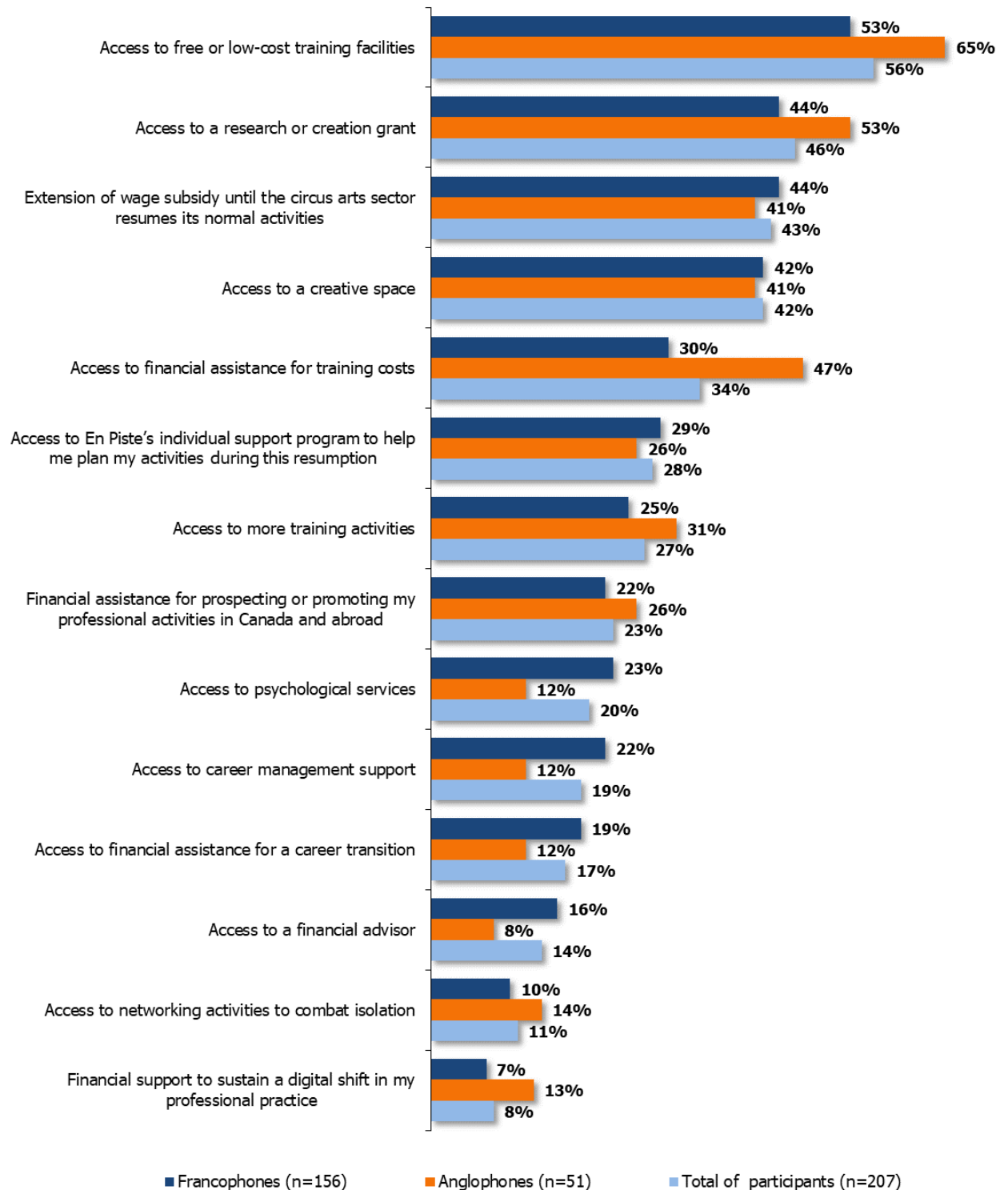
Figure 19—Type(s) of Projects



**Q17 What new activities have you undertaken or had to undertake since the beginning of the pandemic? Check all that apply.**

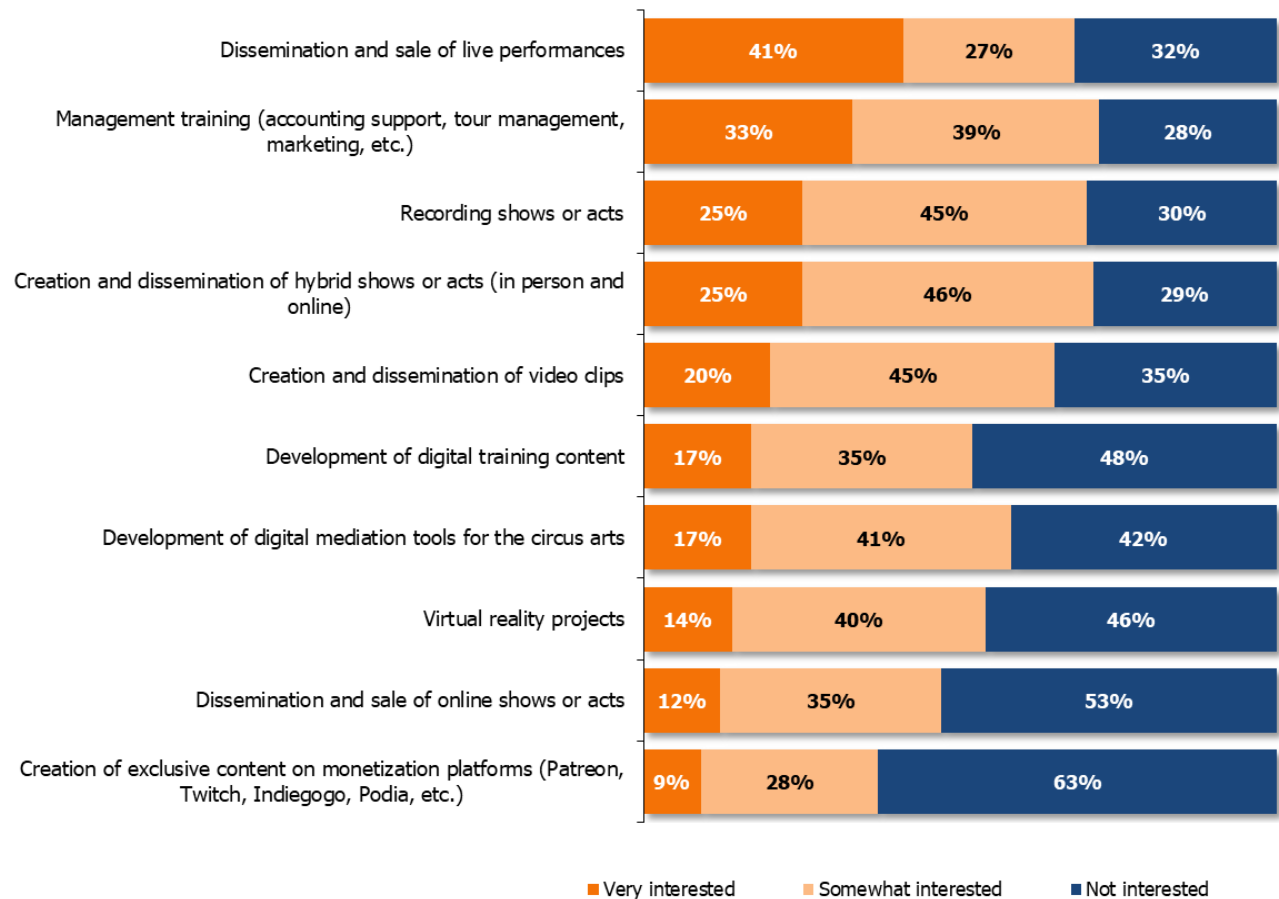


**Q18 What will you need to regain your pre-pandemic professional momentum? Select the five most important needs.**

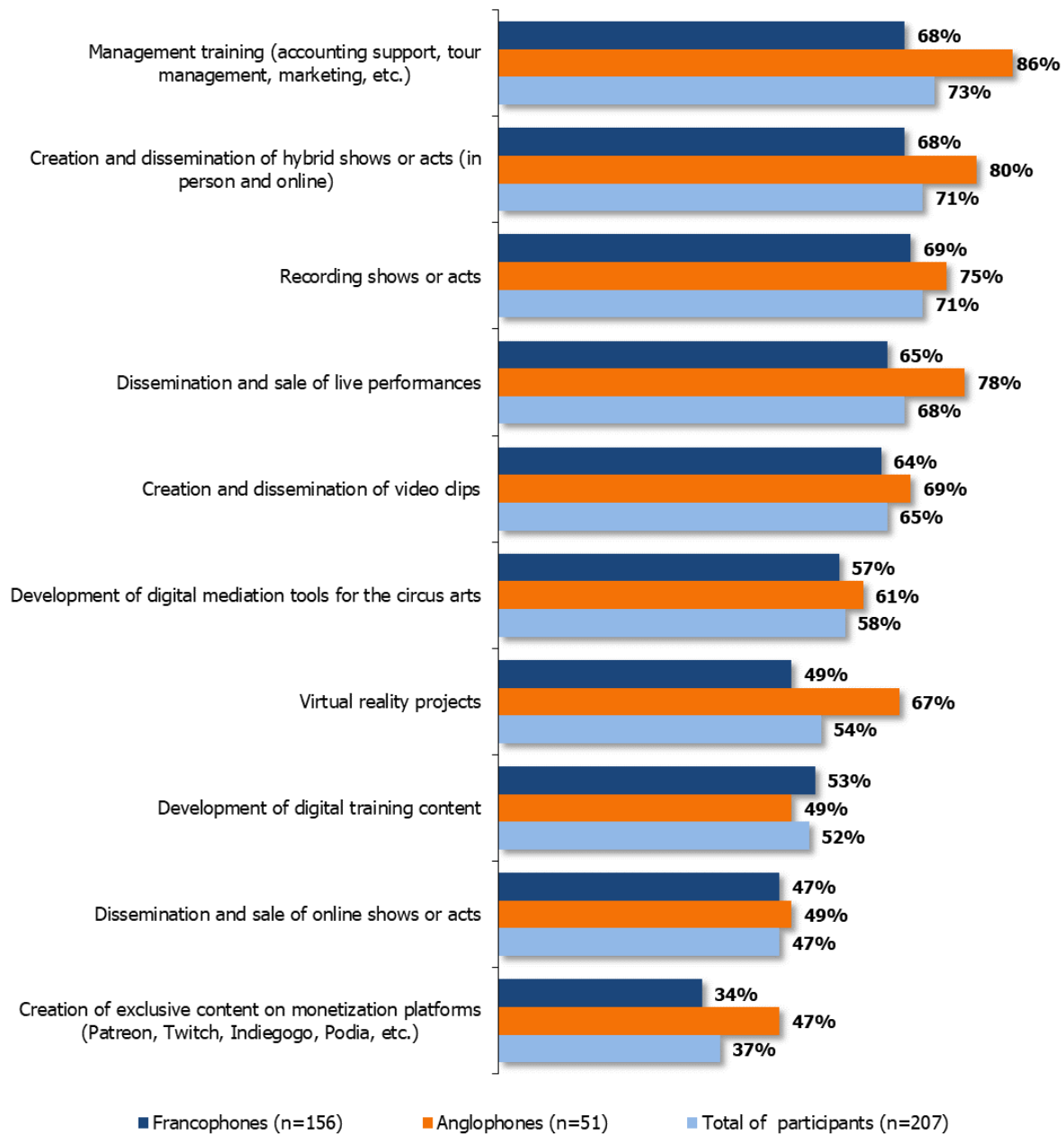


## Q19 What is your level of interest in the following areas of digital development?

Figure 22—Level of Interest in the Following Areas of Digital Development (n=207)

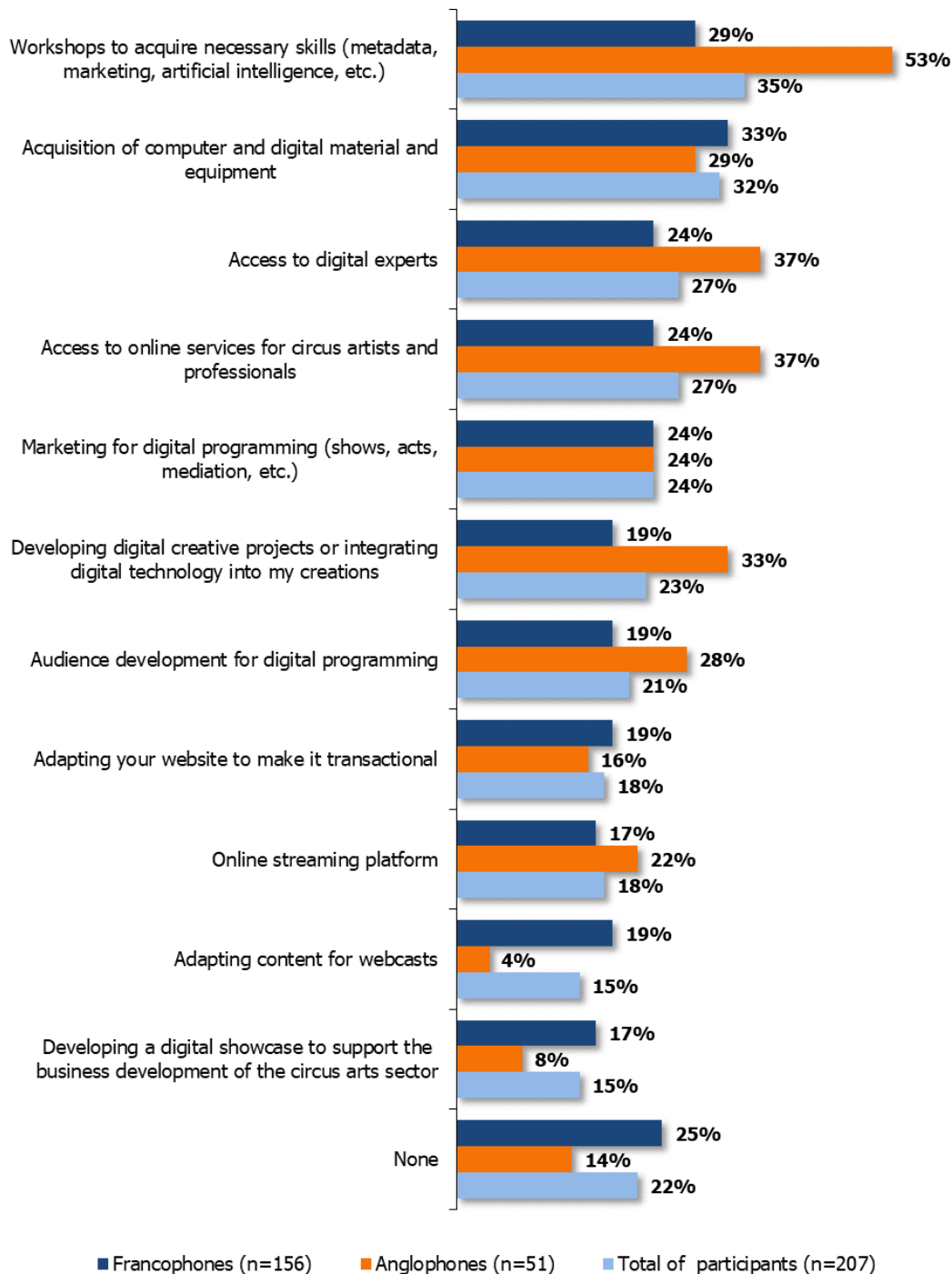


**Figure 23—Level of Interest in the Following Areas of Digital Development: Answers Very Interested + Somewhat Interested**



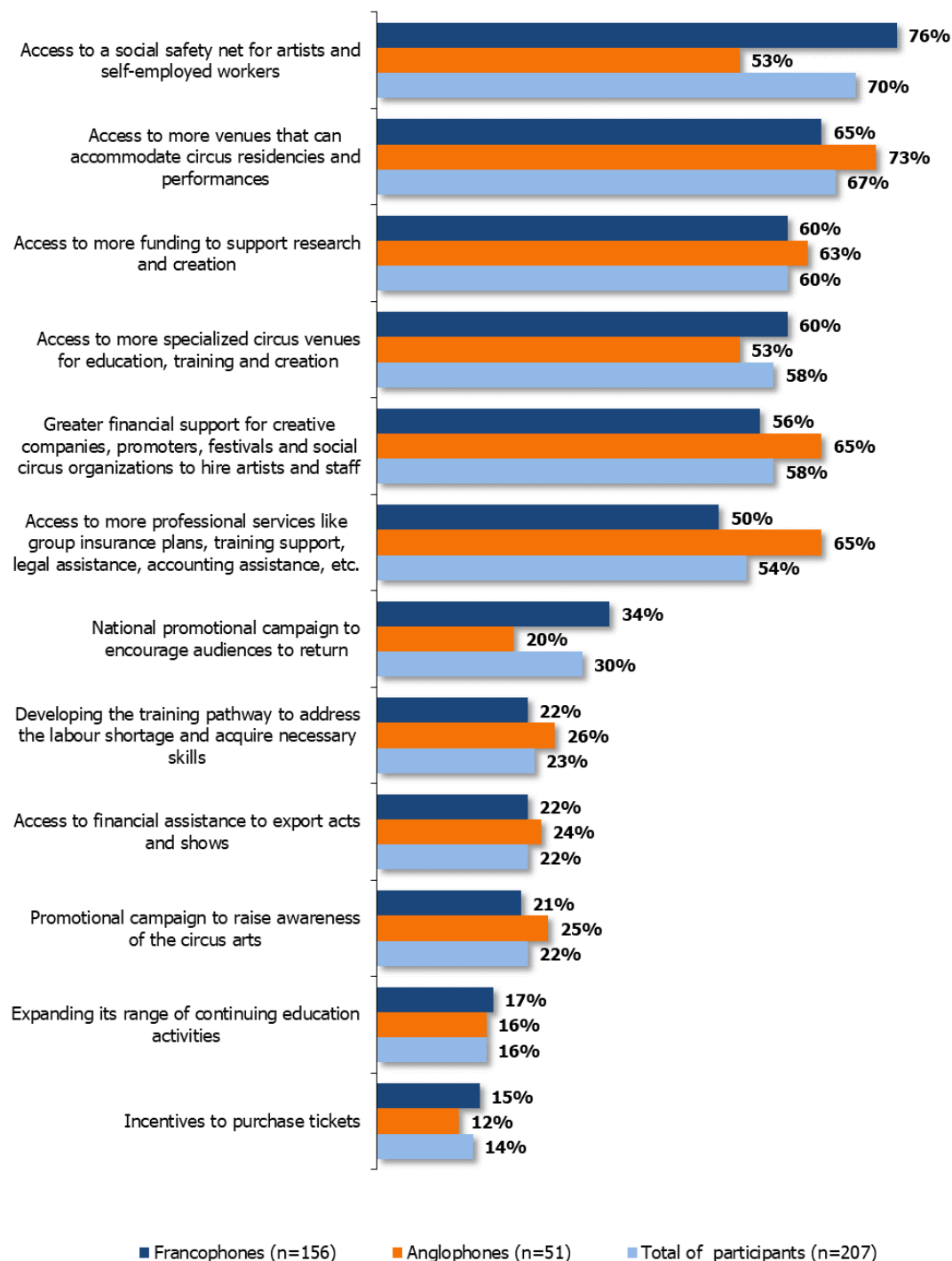
**Q20 Apart from access to funding, what do you need to address digital development challenges? Select the four most important needs.**

**Figure 24—Needs to Address Digital Development Challenges Apart from Access to Funding**



**Q21 From your understanding of the challenges facing our sector, what should the circus arts sector prioritize to regain its momentum? Select the five most important priorities.**

**Figure 25—Priorities for the Circus Arts Sector to Regain its Momentum**

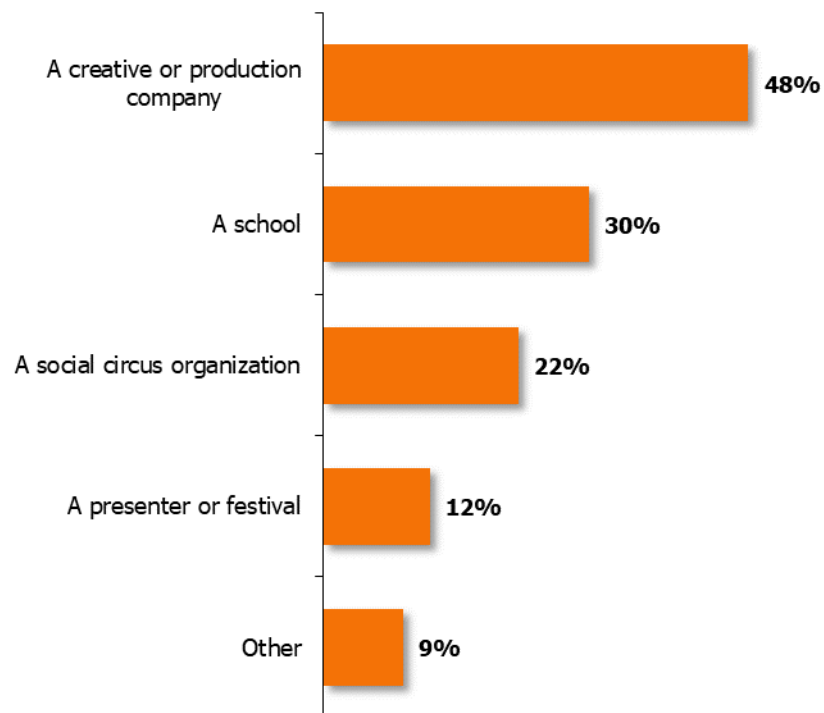




## Appendix 2: Survey of organizations

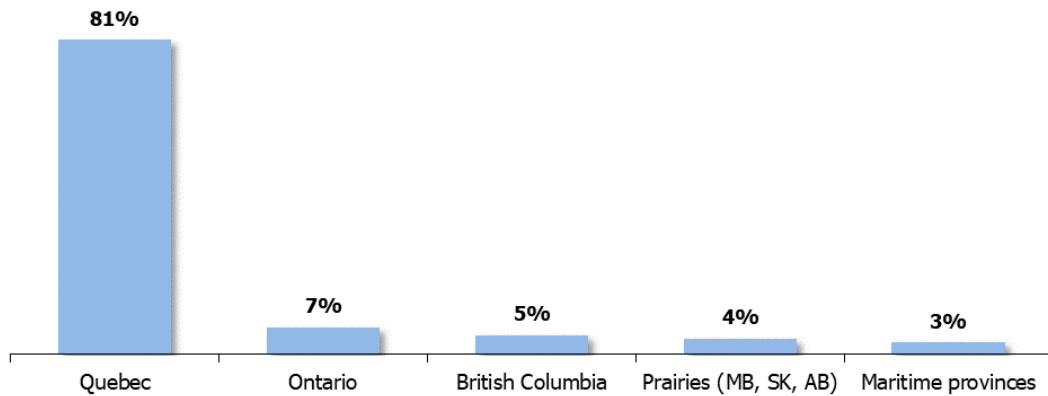
**Q1 You are: (Tick all boxes that apply)**

**Figure 1—Type of Organization (n=81)**



**Q2 Your organization is located in:**

**Figure 2—Location (province) of Organization (n=81)**



**Q3 Did your organization generate any income during the fiscal year ended 2020?**

**Q4 Did or will your organization generate any income during the current fiscal year (estimated)?**

**Figure 3—2020 Income Generated (n=81)**

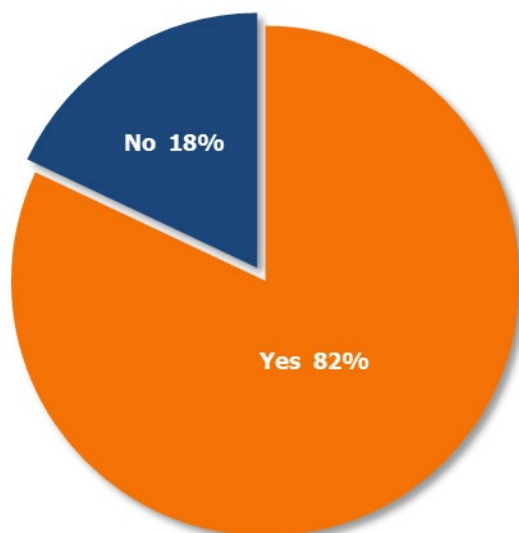
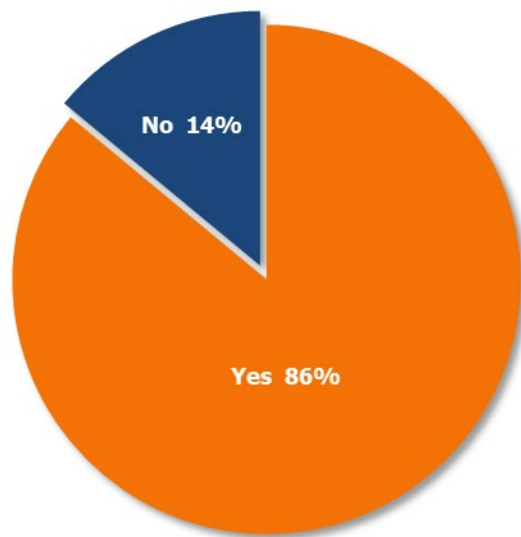


Figure 4—2021 Income Generated (n=81)



**Q5 Indicate your organization's annual turnover (total revenues), including revenue outside of Canada:**

**Q6 Please break down your annual income related to your professional circus arts activities according to the territory and online:**

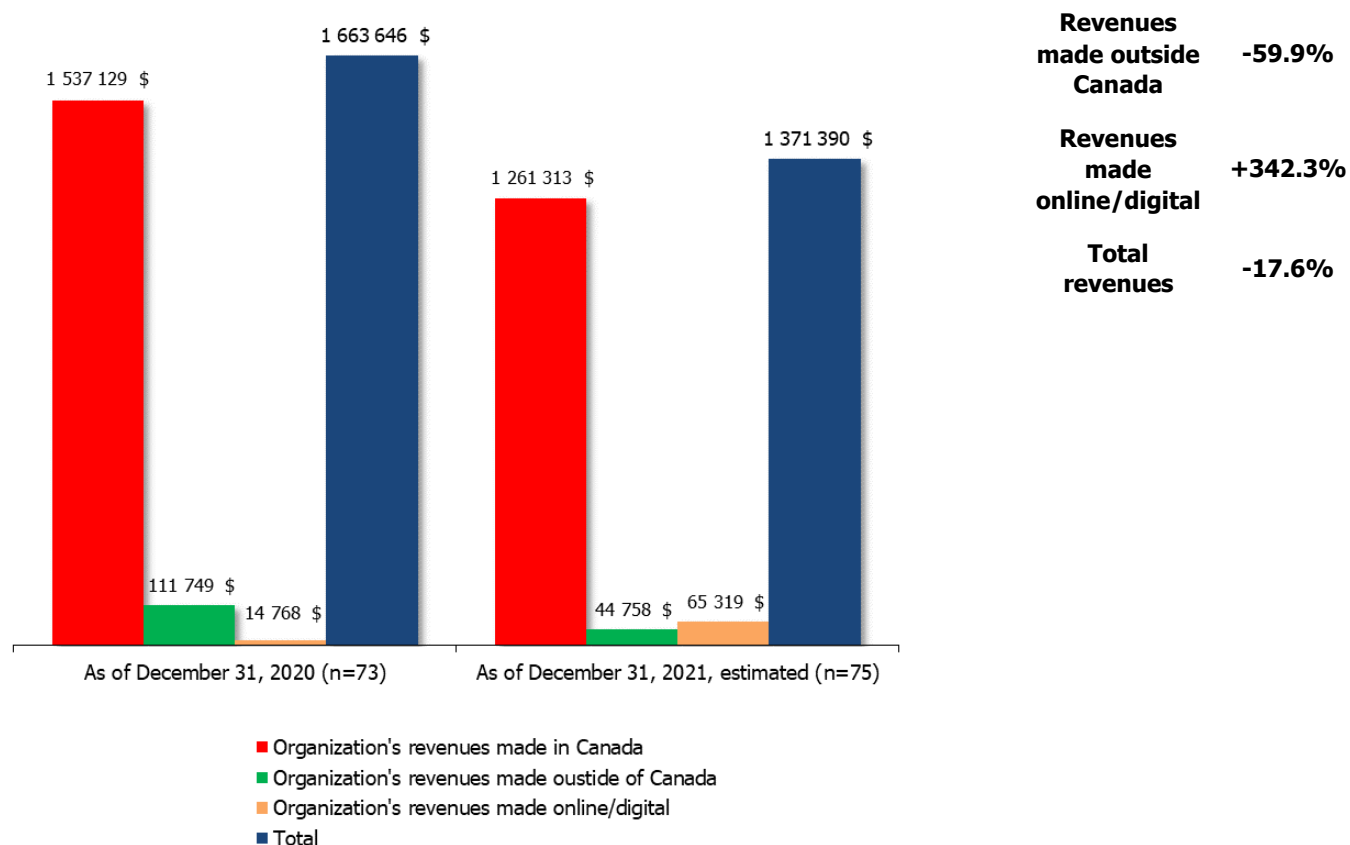
**As of December 31, 2020**

**As of December 31, 2021 (estimated)**

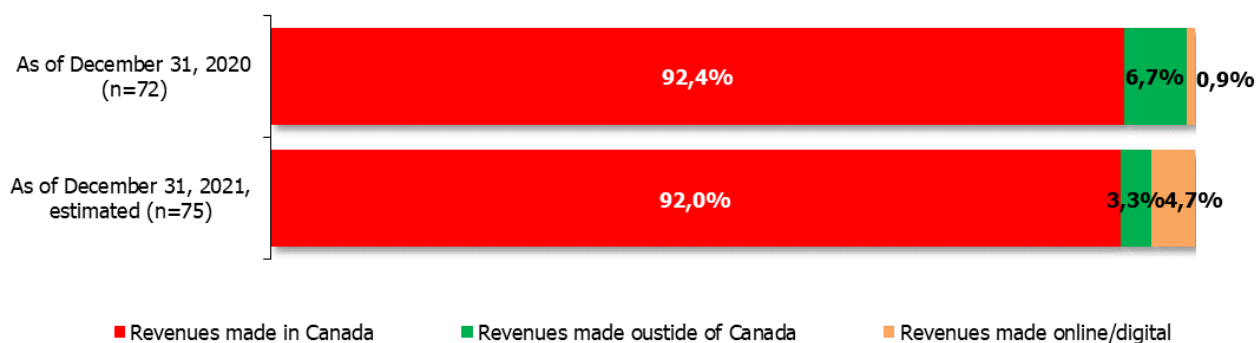
Figure 5—Organization's Turnover Made in Canada, Outside of Canada, Online/Digital and Total: Average per Participant

**Variation from 2020 to 2021**

<b>Revenues made in Canada</b>	<b>-17.9%</b>
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**Figure 6—Annual Turnover: Distribution Between Revenues in Canada, Outside of Canada and Online/Digital**

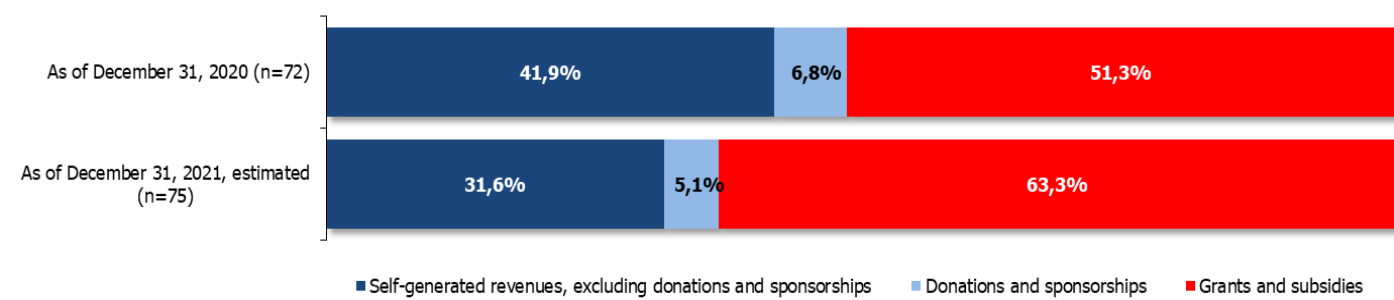


**Q7 Please break down your annual turnover as a percentage according to the nature of your income**

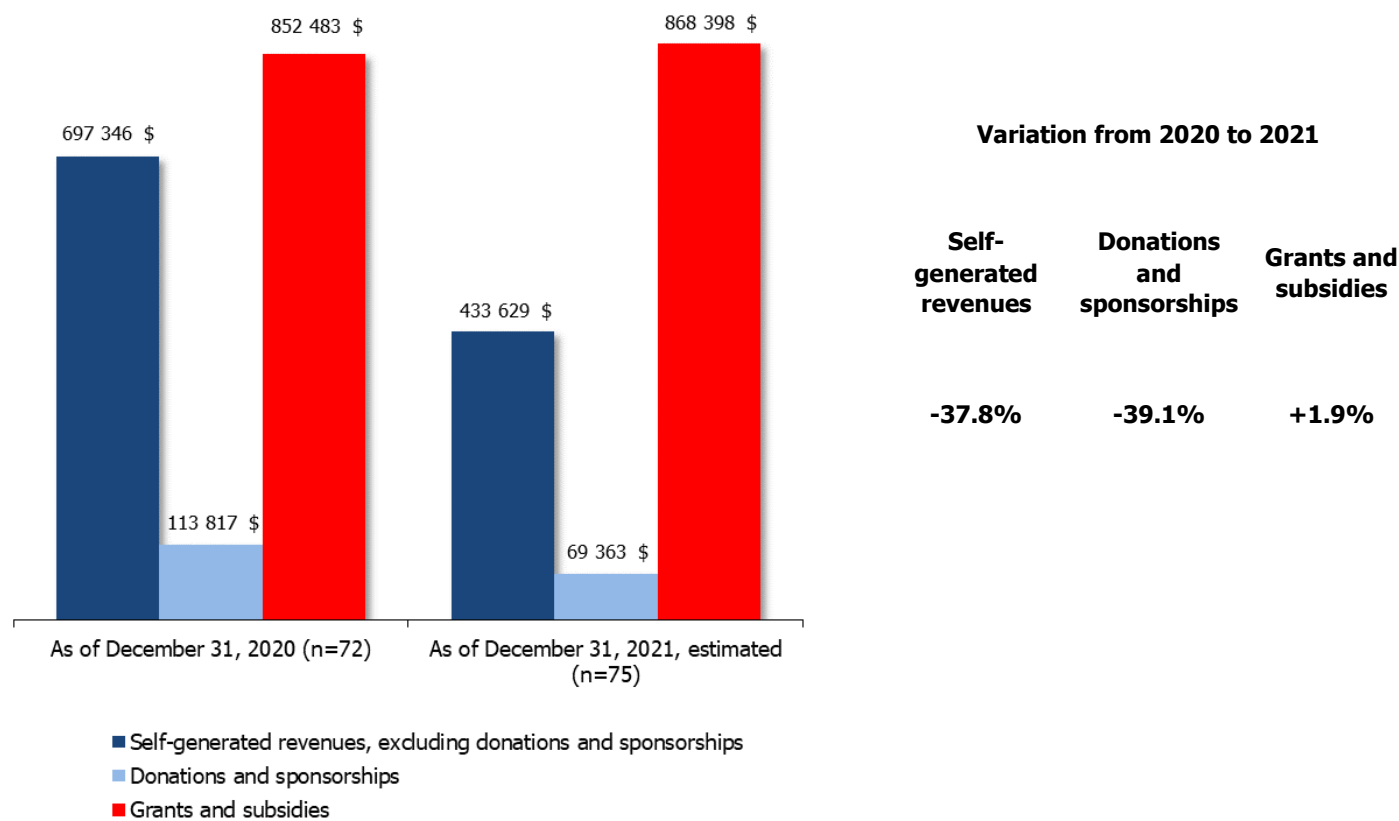
**As of December 31, 2020**

**As of December 31, 2021 (estimated)**

**Figure 7—Annual Turnover: Breakdown by Type of Revenue**

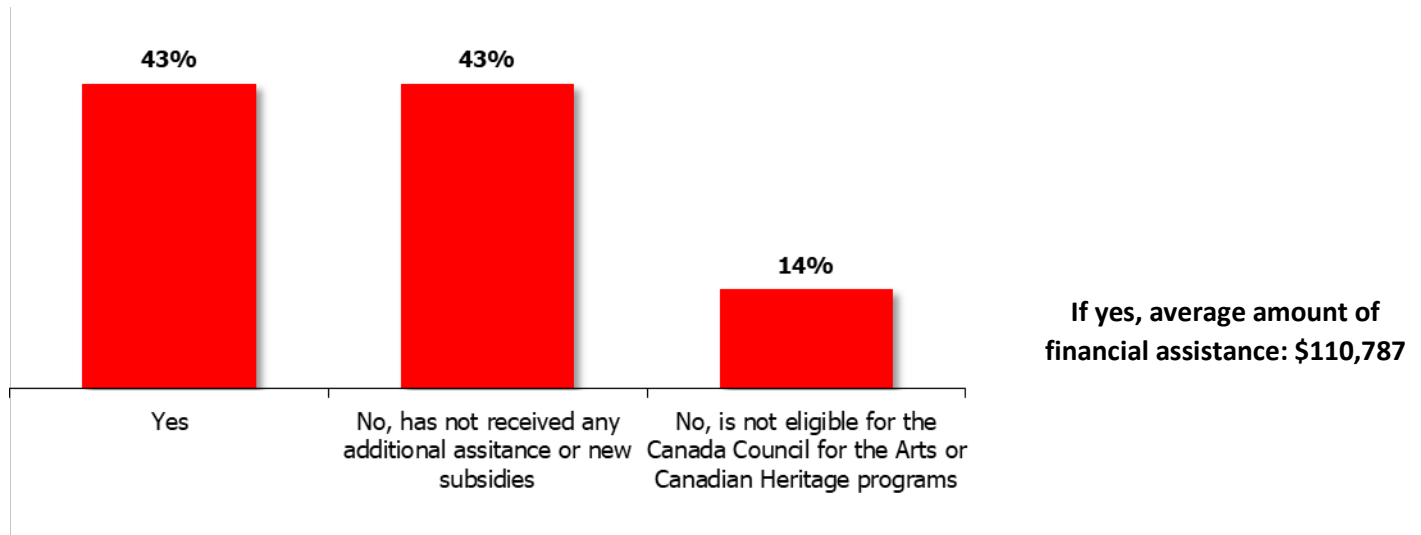


**Figure 8—Revenues by Type of Income: Average per Respondent**



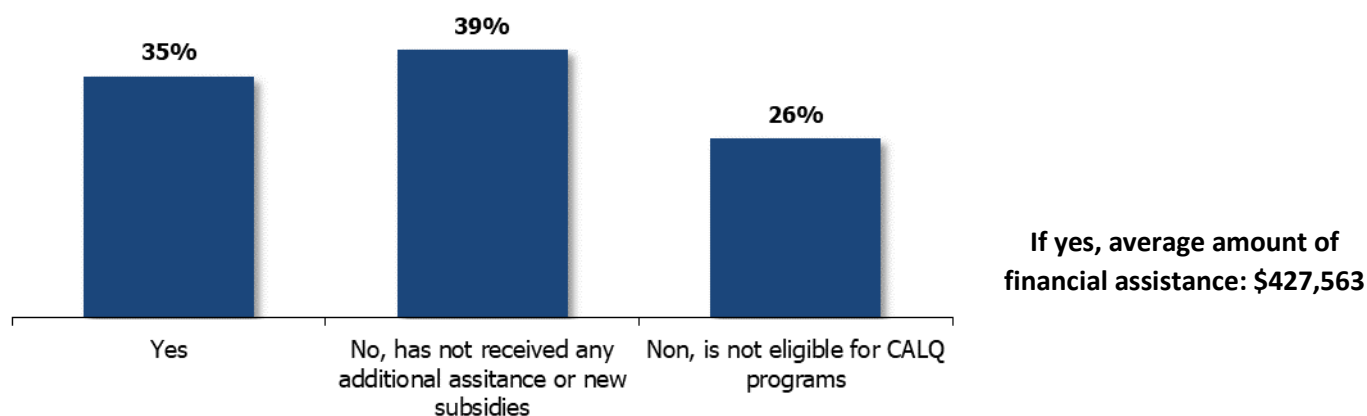
**Q8 during the pandemic, have you received additional financial assistance from the Canada Council for the Arts or Canadian Heritage?**

**Figure 9—Additional Financial Assistance Received from the Canada Council for the Arts or Canadian Heritage during the Pandemic (n=81)**



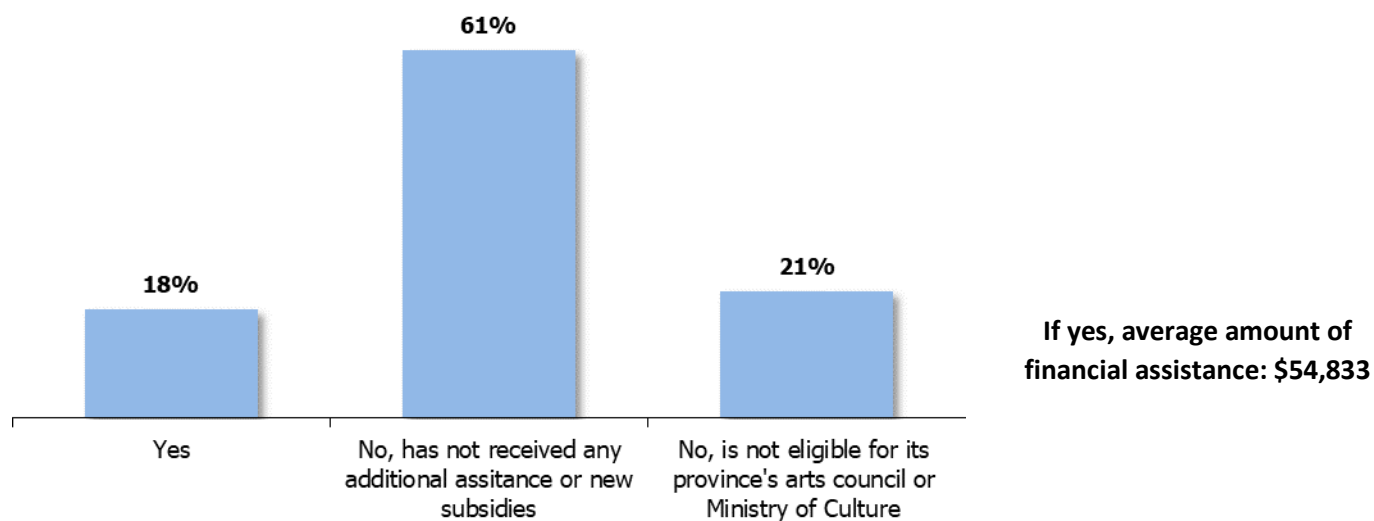
**Q9 If your head office is located in Quebec, has your organization benefited from the \$21.8 million in financial assistance?**

**Figure 10 — If the Head Office is in Quebec, Benefiting from the \$21.8 Million in Financial Assistance (n=72)**



**Q10 If your head office is located outside Quebec, have you received financial assistance from your province's arts council or Ministry of Culture to support you during the pandemic?**

**Figure 11 — If the Head Office is Outside Quebec, Financial Assistance from the Province's Arts Council or Ministry of Culture as Support during the Pandemic (n=38)**

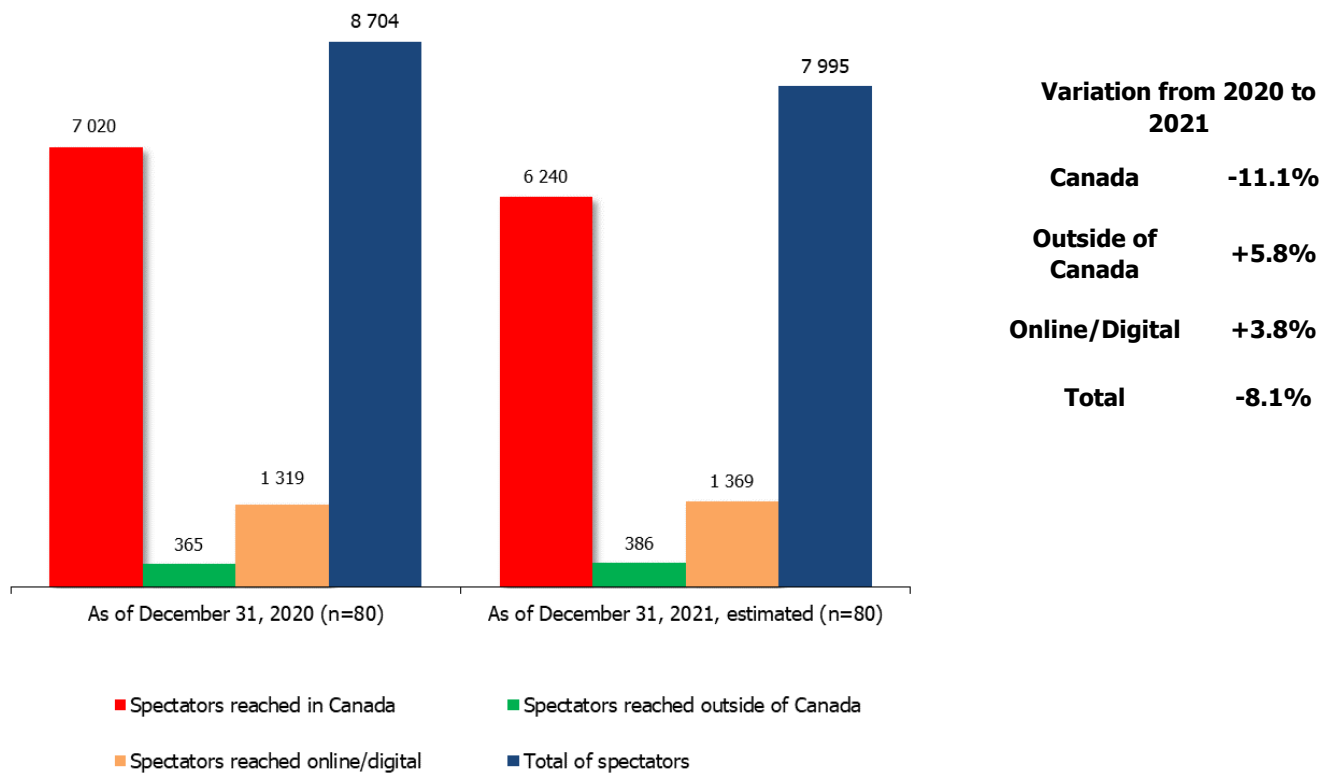


**Q12 How many spectators have you reached in Canada/outside of Canada/online/total:**

**As of December 31, 2020**

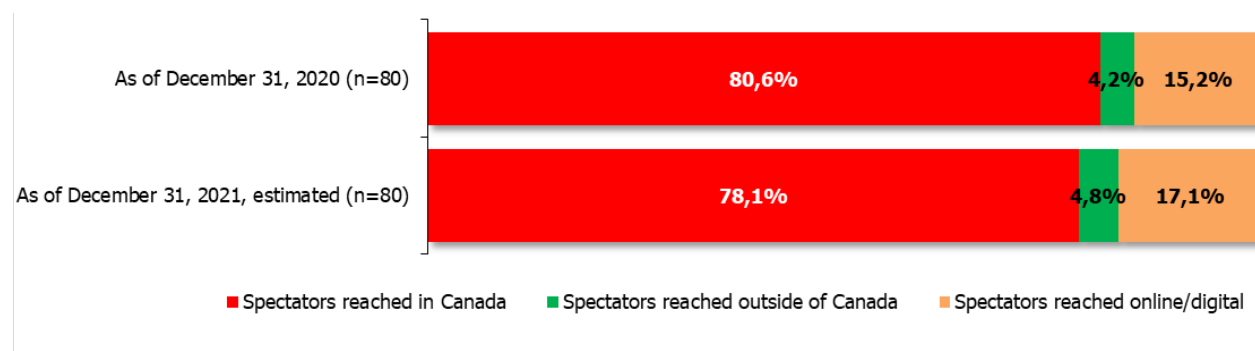
**As of December 31, 2021 (estimated)**

**Figure 12—Number of Spectators Reached in Canada, Outside of Canada, Online/Digital and Total: Average per Participant**





**Figure 13—Number of Spectators Reached: Distribution between Those Reached in Canada, Outside of Canada and Online/Digital**

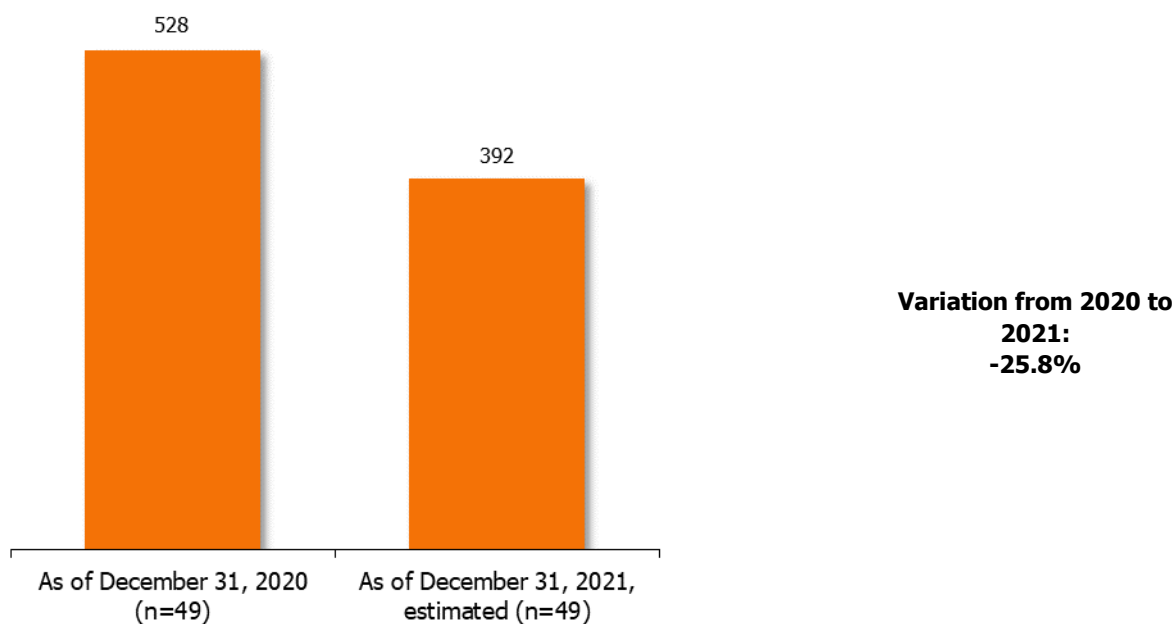


**Q12 If you are an educational institution or social circus organization, how many participants have you reached through your programs or activities?**

**As of December 31, 2020**

**As of December 31, 2021 (estimated)**

**Figure 14—Number of Participants Joined in Educational Programs or Activities (Educational Institution or Social Circus Company): Average per Participant**

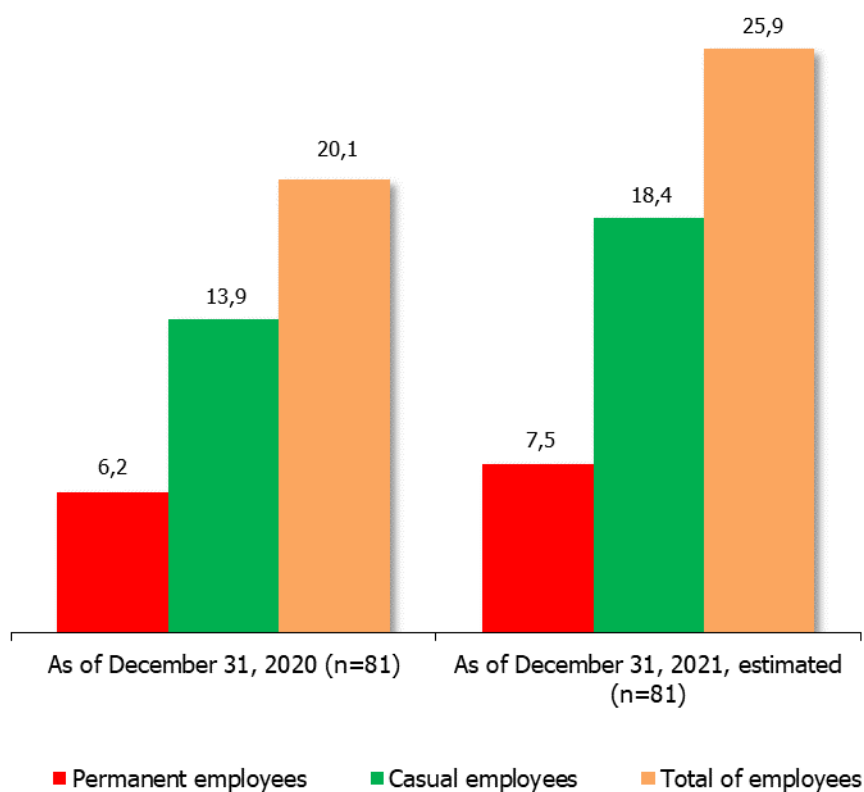


**Q13 How many permanent and casual employees did you have in your organization:**

**As of December 31, 2020**

**As of December 31, 2021 (estimated)**

**Figure 15—Number of permanent, Casual and Total Employees: Average per Participant**

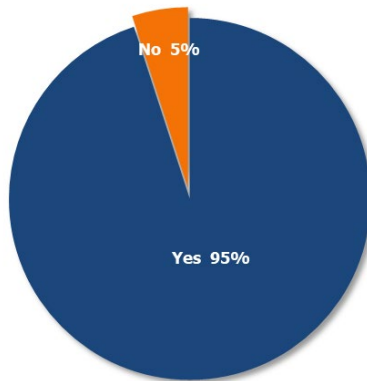


**Variation from 2020 to 2021**

permanent employees	Casual employees	Total
+21.0%	+32.4%	+28 9%

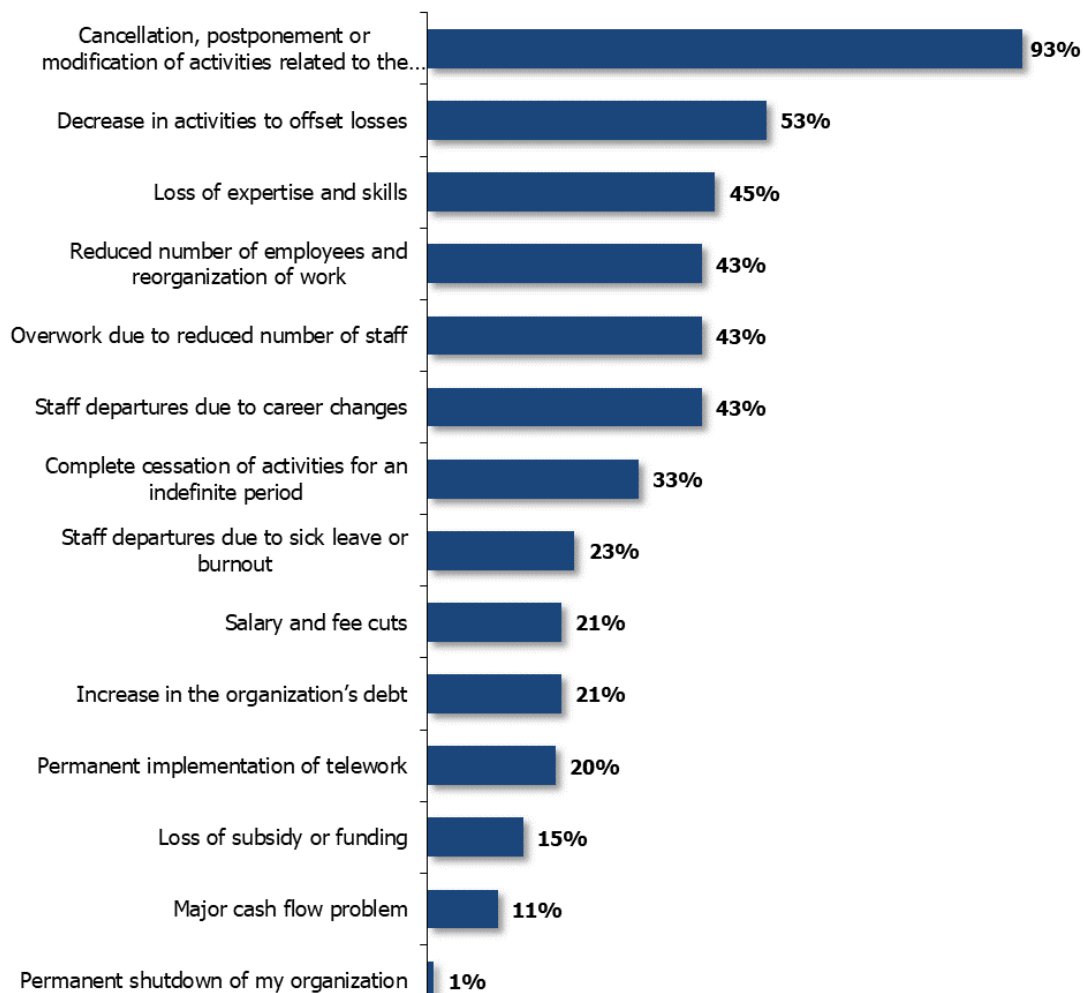
**Q14 As of today (August 2021), are you still being negatively impacted by the pandemic?**

**Figure 16—Negative Impacts of the Pandemic Still Being Experienced, As of August 2021 (n=81)**



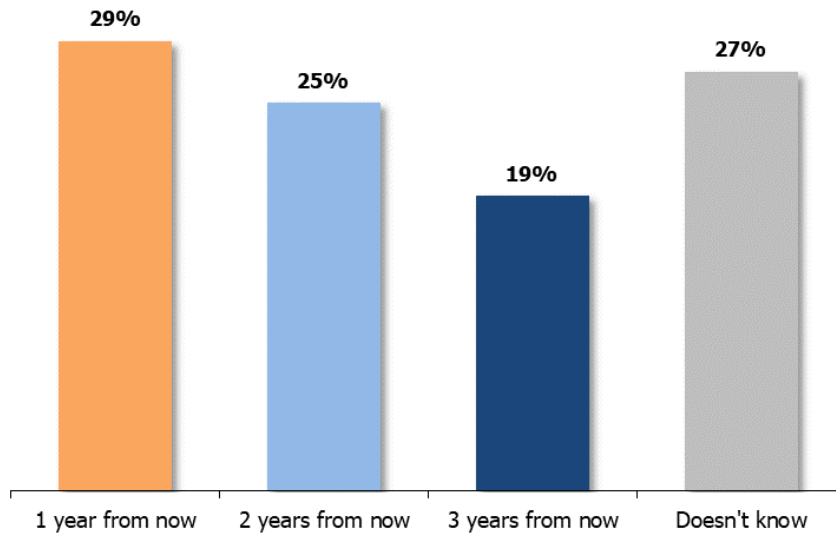
**Q15 What impacts are you experiencing? Check all that apply.**

**Figure 17—Negative Impacts of the Pandemic (n=75)**



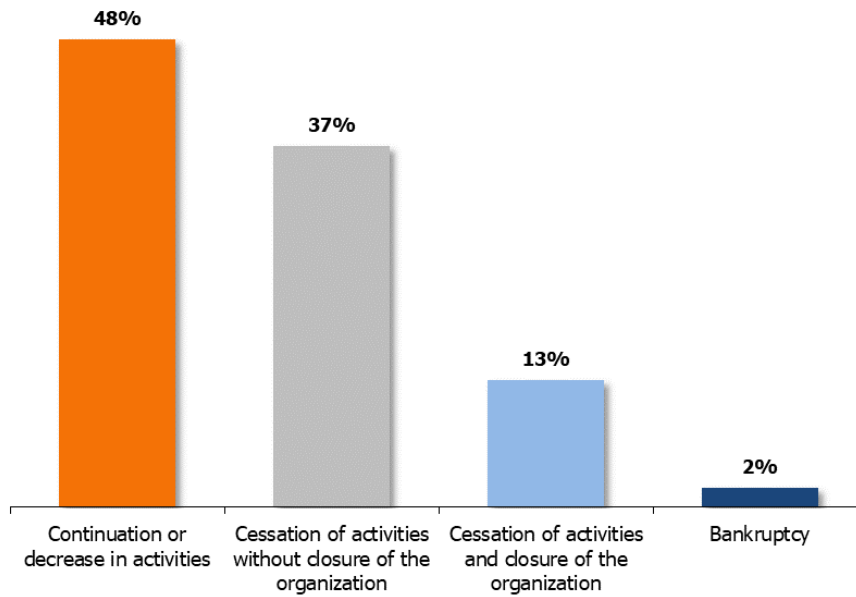
**Q16 If the recovery continues, when do you expect your activities and financial situation to return to pre-pandemic levels?**

**Figure 18—Expected Time for Activities and Financial Situation to Return to Pre-Pandemic Levels, if the Recovery Continues (n=79)**



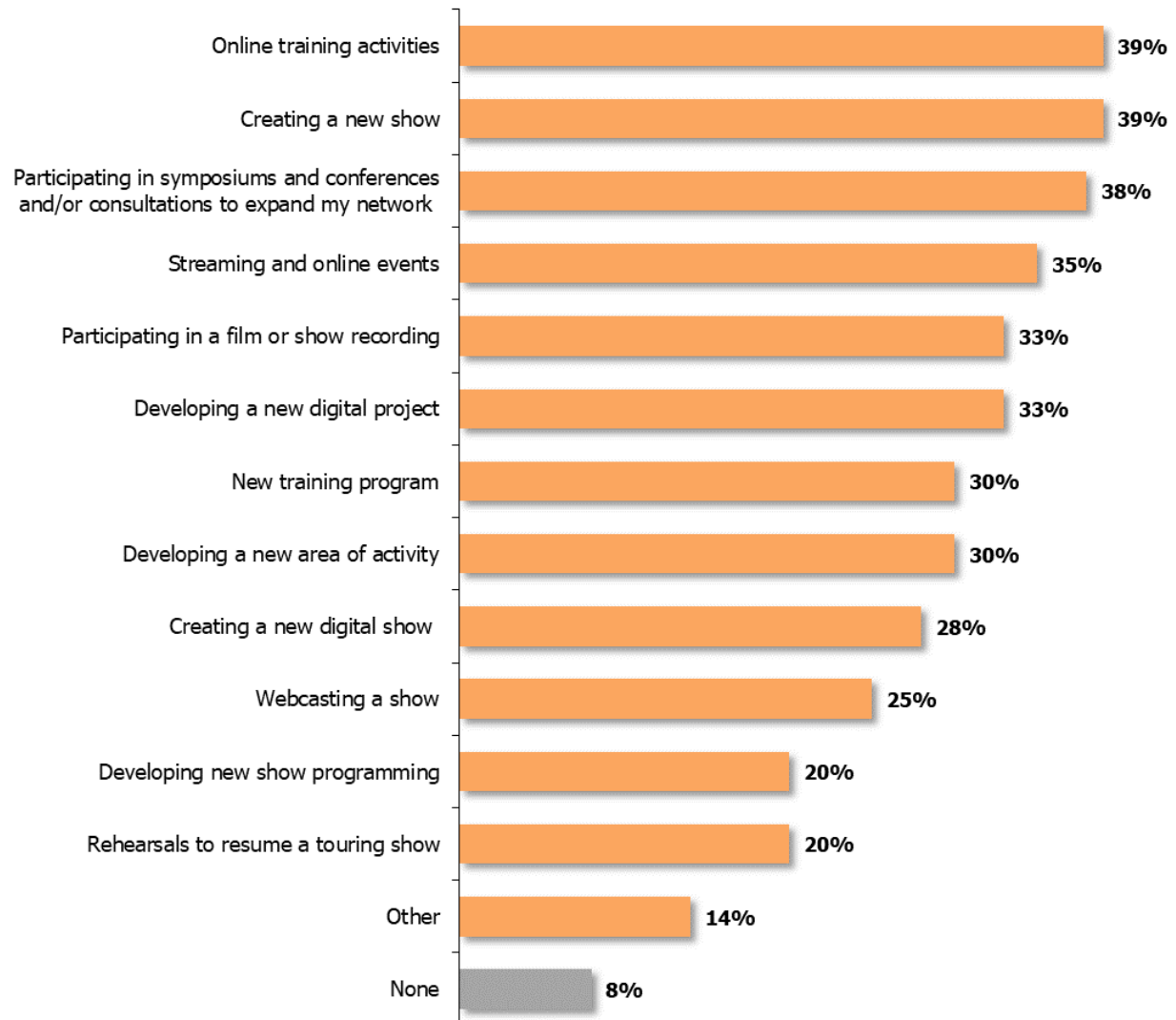
**Q17 If another wave of the pandemic resulted in a full or partial cessation of activities, what situation would most likely apply to your organization?**

**Figure 19—Most Likely to Apply in the Event of another Pandemic Wave Resulting in a Complete or Partial Shutdown (n=79)**



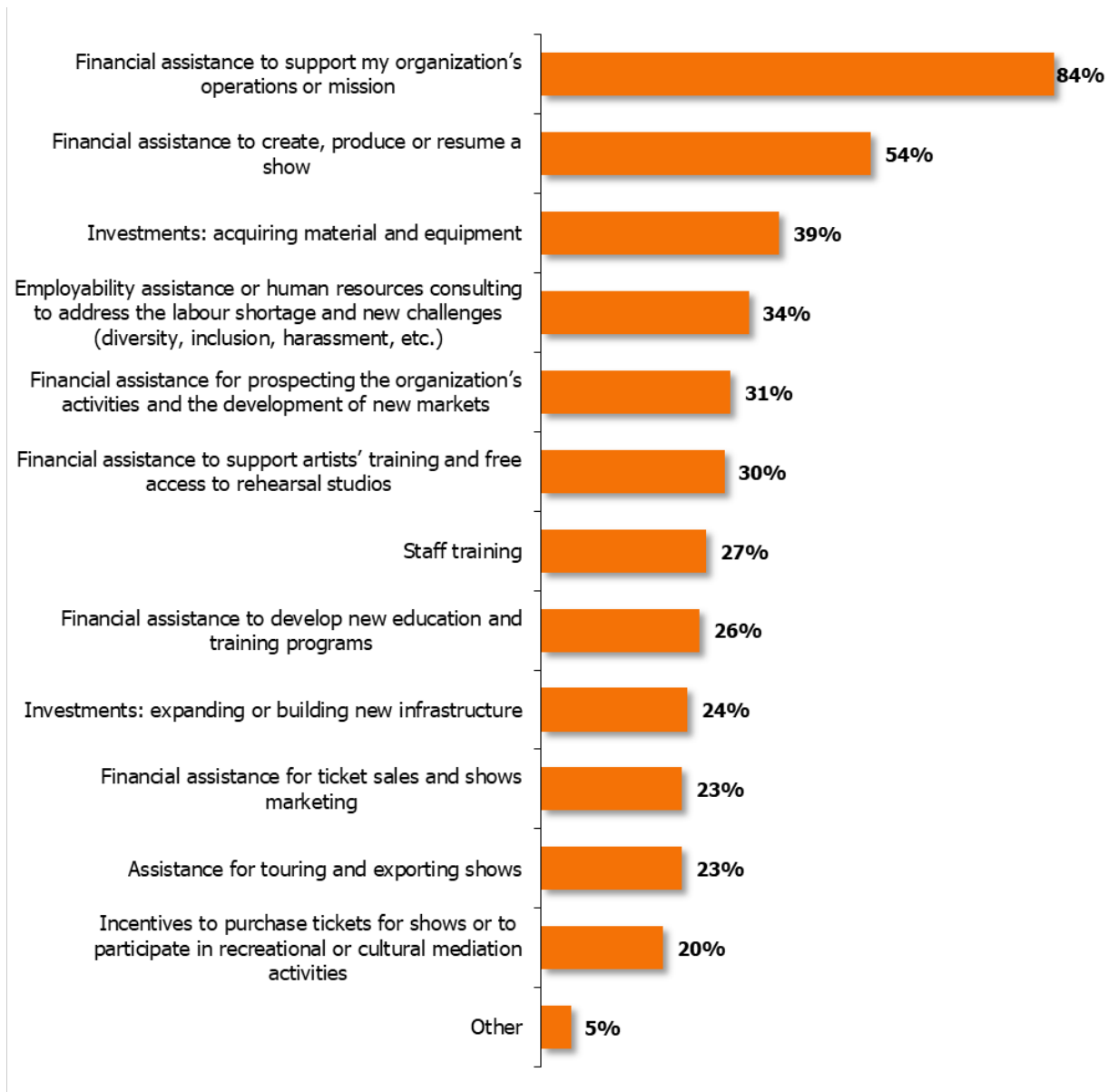
**Q18 What new activities have you introduced to continue your activities during the pandemic? Check all that apply.**

**Figure 20—New Activities Put in Place to Ensure Business Continuity during the Pandemic (n=79)**



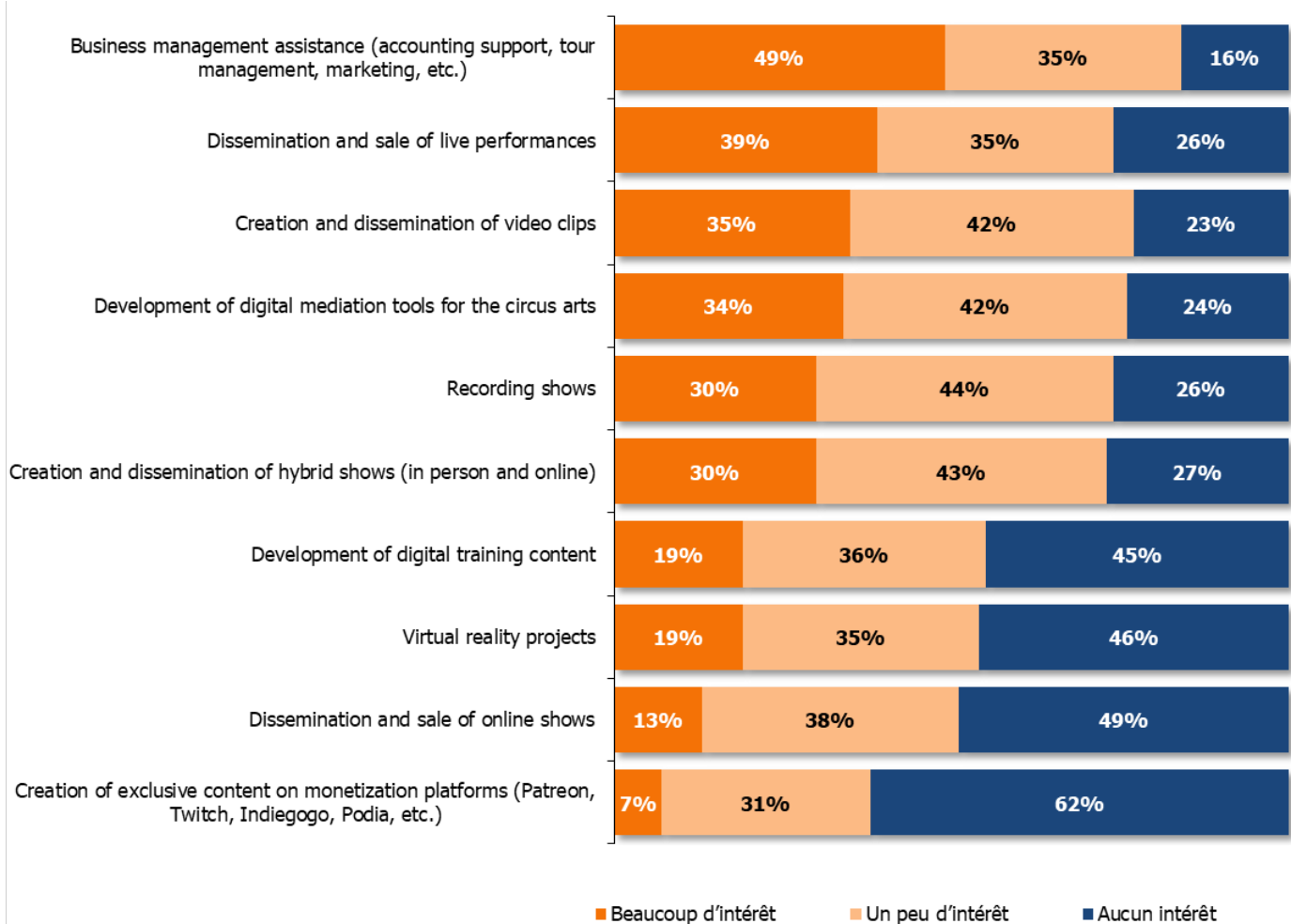
**Q19 What will your organization need to regain its pre-pandemic momentum and restore its reach? Select the five most important needs.**

**Figure 21—Needs to Regain Their Pre-Pandemic Momentum and Restore Their Reach (n=74)**



## Q20 What is your level of interest in the following areas of digital development?

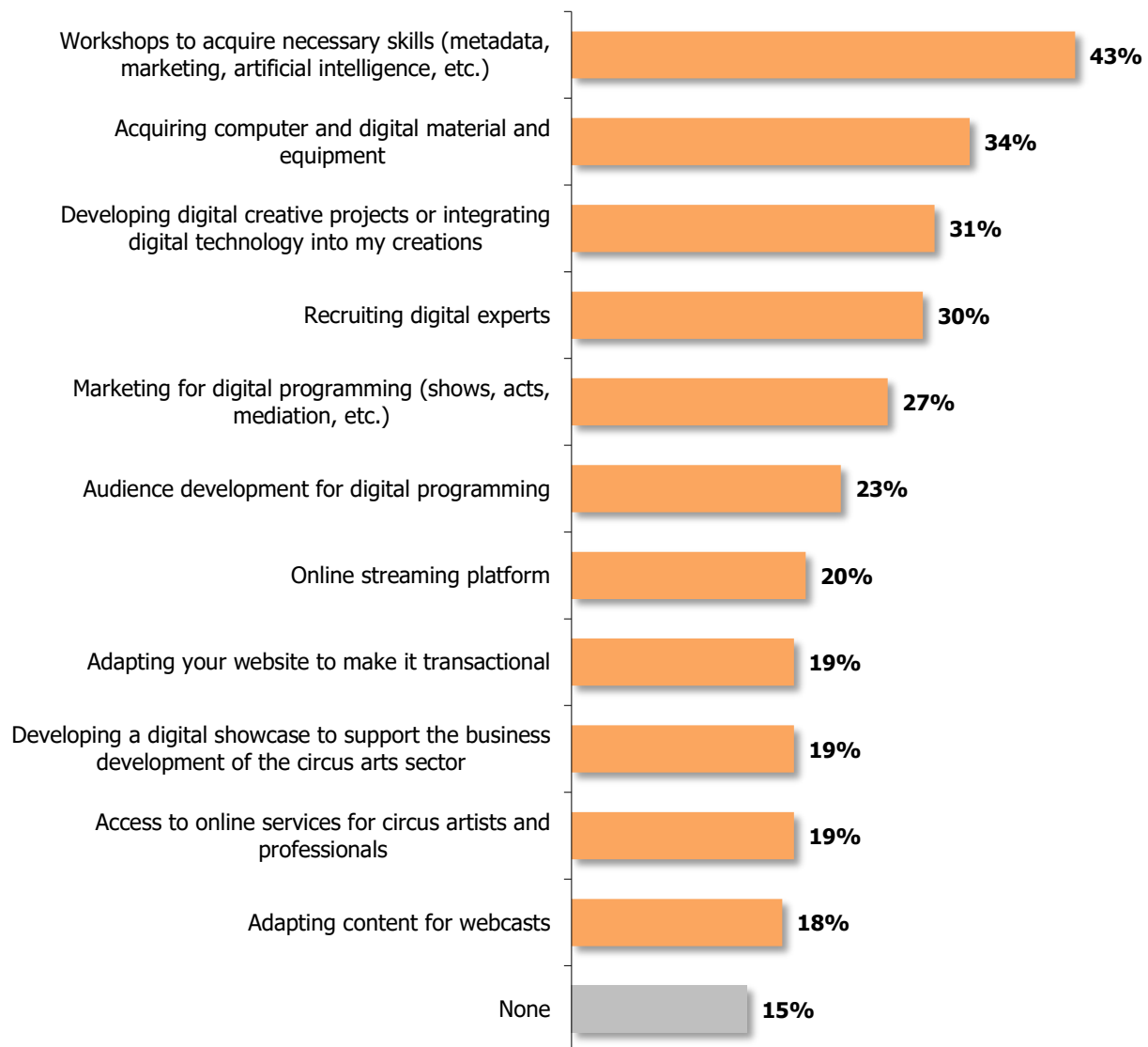
Figure 22—Level of Interest in the Following Areas of Digital Development (n=74)





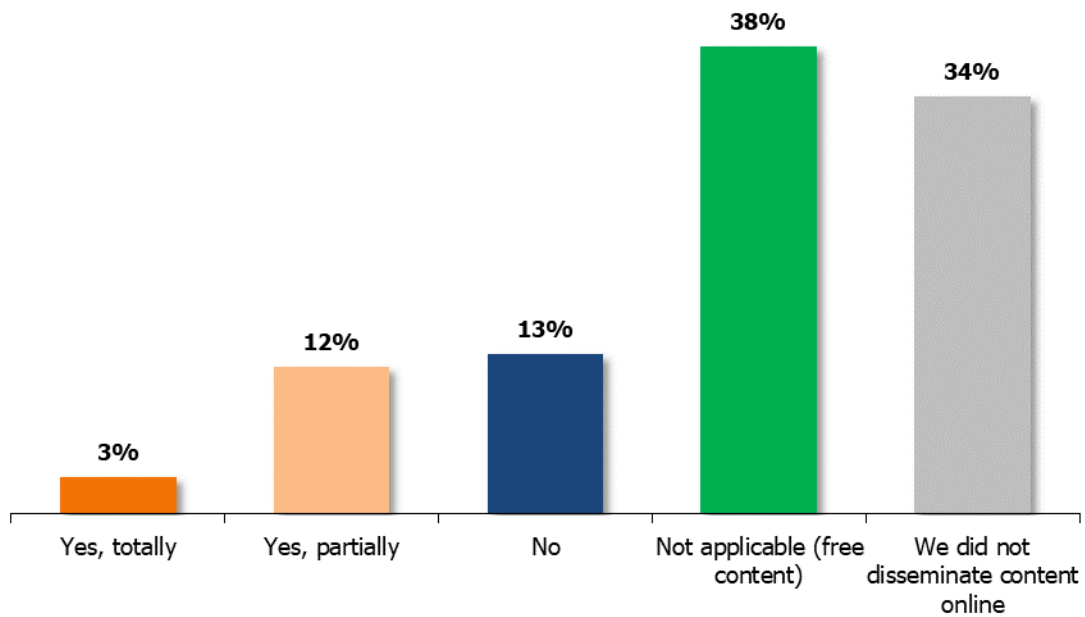
**Q21 Apart from access to funding, what do you need to address digital development challenges? Select the four most important needs.**

**Figure 23—Needs to Address Digital Development Challenges Apart from Access to Funding (n=74)**



**Q22 If you disseminated paid content online, were you able to recoup production costs for the digital work?**

**Figure 24 — If the Online Content Is Paid for, the Production Costs of the Digital Work Are Made Profitable (n=74)**



**Q23 From your understanding of the challenges facing our sector, what should the circus arts sector prioritize to regain its momentum? Select the five most important priorities.**

**Figure 25—Priorities for the Circus Arts Sector to Regain its Momentum (n=74)**

