

Impacts of COVID-19 on the circus arts sector in Canada

Results of the surveys among artists, cultural workers and
circus companies in Canada

April 2020

en piste

REGROUPEMENT NATIONAL DES ARTS DU CIRQUE
NATIONAL CIRCUS ARTS ALLIANCE

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Context and objective

In the context of the crisis related to COVID-19, En Piste, National Circus Arts Alliance, considers it fundamental to represent the interests of the circus arts sector in order to support it through this unprecedented crisis. This is why the Alliance conducted a survey to assess the impact of the crisis and its effects on organizations, artists and self-employed workers. The results demonstrate the consequences of the crisis on the future of the circus arts sector.

The survey was conducted in collaboration with Simon Bastien. Mr. Bastien holds a Master's degree in Management Sciences from HEC Montréal and has been a management consultant for over 30 years. He has managed more than 800 projects, mainly in the fields of strategic planning, economic studies, marketing research and quality management.

Methodology

Target populations

The survey universe is composed of two targets:

- Individuals, mainly composed of self-employed workers, artists, trainers, technicians, etc. The survey was sent to 607 individuals.
- Companies, e.g. creative companies, schools, training venues, production agencies, presenters, etc. The survey was sent to 109 companies.

Collection method and period

The survey was conducted online. An email explaining the objectives of the survey was sent by En Piste to both target populations. The email included a link to access the survey. Respondents could complete the questionnaire in either English or French, depending on their preference.

The collection period took place from April 6 to 19, 2020.

Participation rate and margin of error

- In the case of individuals, 477 questionnaires were completed, for a participation rate of 79%. As an indication, the margin of error is 2.1%.
- In the case of companies, 84 questionnaires were completed, for a participation rate of 77%. As an indication, the margin of error is 5.1%.

A total of 561 respondents took part in the survey. It should be noted that these are exceptionally high participation rates for an online survey. The margin of error is provided as a guideline only, as it does not theoretically apply to online surveys, which are not probabilistic.

Survey highlights

Survey of individuals

- Some data on their profile:
 - 74% responded to the survey in French, 85% reside in Quebec and 78% are Canadian citizens.
 - 81% are artists, 30% are trainers, instructors or coaches and 15% are designers.
 - The annual income related to their professional activities in the circus arts is less than \$20,000 for 32% of respondents and \$60,000 or more for 12% of respondents.
- The total and cumulative loss of income is as follows:
 - As of March 31, 2020: \$2,287 on average per respondent and \$1,033,909 for all respondents.
 - As of May 31, 2020: \$6,695 on average and \$3,099,957 for all respondents.
 - As of July 31, 2020: \$14,507 on average and \$6,716,541 overall.
- The main types of contracts lost are: show tours (54%), corporate events (50%), creating a new show (48%), rehearsals (46%), teaching/coaching (40%) and training (39%).
- In addition to loss of income, the most significant impacts are: inability to plan for their future work due to uncertainty within the companies (76%), cancellation or postponement of an artistic project (research, creation, residency, etc.) (71%), inability to train adequately (71%), complete cessation of professional activities (68%), and inability to sell one's act in the current context (55%). In addition, the loss of grants is mentioned by only 4% of respondents.¹
- 62% of respondents feel that the financial losses incurred and estimated as of July 31 are jeopardizing their ability to continue their professional activities (13% definitely, 43% possibly).
- 66% are considering a career transition (9% definitely, 57% possibly).
- In addition to the current measures put in place by governments, the main needs to ensure the resumption of operations are: access to training facilities (62%), access to financial assistance to support them in their training after a few months off (57%), access to a creation space (46%), the launch of a restart campaign to support cultural activities among the population (46%), and access to a research or creation grant (40%).

¹ Figures illustrating the full results are presented in Annex 1 of this document.

Survey of organizations

- Some data on their profile:
 - 61% completed the survey in French and 64% are located in Quebec.
 - 60% are a creative company, 32% a school, 25% a training facility, 24% a production company and 17% a presenter.
 - As at December 31, 2019, 37% of respondents had sales of less than \$100,000 and 10% had sales of \$1,000,000 or more.
 - As at December 31, 2019, the number of permanent employees averaged 5.6 (median of 2) and the number of casual employees averaged 20.9 (median of 7).
- The total and cumulative loss of income is as follows:
 - As of March 31, 2020: \$37,830 on average per respondent and \$3,102,028 for all respondents.
 - As of May 31, 2020: \$174,249 on average and \$14,426,650 for all respondents.
 - As of July 31, 2020: \$233,911 on average and \$19,180,736 overall.
- As of July 31, 2020, unpaid fees for artists and self-employed workers are expected to average \$72,080 per respondent and \$6,054,755 for all respondents. This latter figure is similar to that estimated by individuals.
- In addition to the loss of revenue, the most significant direct and indirect impacts on activities are: cancellation or postponement of shows (88%), anticipated loss of clients (70%), complete cessation of operations for an indefinite period of time (63%), temporary closure of the premises (61%), cancellation or postponement of staff training and recruitment activities (58%), and cancellation or postponement of training, educational or cultural mediation activities (57%). In addition, the loss of grants was mentioned by only 11% of respondents.
- Layoffs were reported as follows:
 - Temporary layoffs as of March 31, 2020: 8.9 on average per respondent and 727 for all respondents.
 - Planned permanent layoffs of permanent employees as of July 31, 2020: 2.0 on average and 151 overall.
 - Planned permanent layoffs of casual employees as of July 31, 2020: 6.4 on average and 508 overall.
 - Total permanent layoffs of employees planned as of July 31, 2020: 8.3 on average and 659 overall.

- In addition to layoffs, the main impacts on human resources are: work overload on return due to fewer employees (48%), loss of expertise and skills (46%), fewer hours worked to keep staff employed (44%), and lower wages on return (38%).
- 75% of respondents feel that the financial losses incurred and estimated as of July 31 are jeopardizing their ability to continue operations (25% definitely, 50% possibly).
- In addition to the current measures put in place by governments, the main needs to ensure the recovery of operations are: increased financial assistance for the organization's operations (26%), assistance with the payment of rent and/or mortgage on infrastructures (23%), financial assistance for prospecting and promotion of the company's activities (10%), access to a company consolidation and stabilization fund (8%) and employability assistance (7%).²

² Figures illustrating the full results are presented in Annex 2 of this document.

Conclusion

Considering COVID-19's impacts - loss of revenues, unpaid fees (companies), loss of contracts (individuals), impact on activities, layoffs (companies), consequences on human resources (companies), continuation of professional activities or operations - the circus arts sector will be in an extremely precarious situation as of July 31, 2020. This situation could jeopardize its very ability to continue its activities.

The very high level of precariousness in the circus arts sector was already being measured in mid-April 2020, as demonstrated by the results of a survey conducted on behalf of the Canada Council for the Arts (National Survey on Federal Emergency Assistance Measures and the Arts Sector, April 14, 2020, 7,500 respondents).

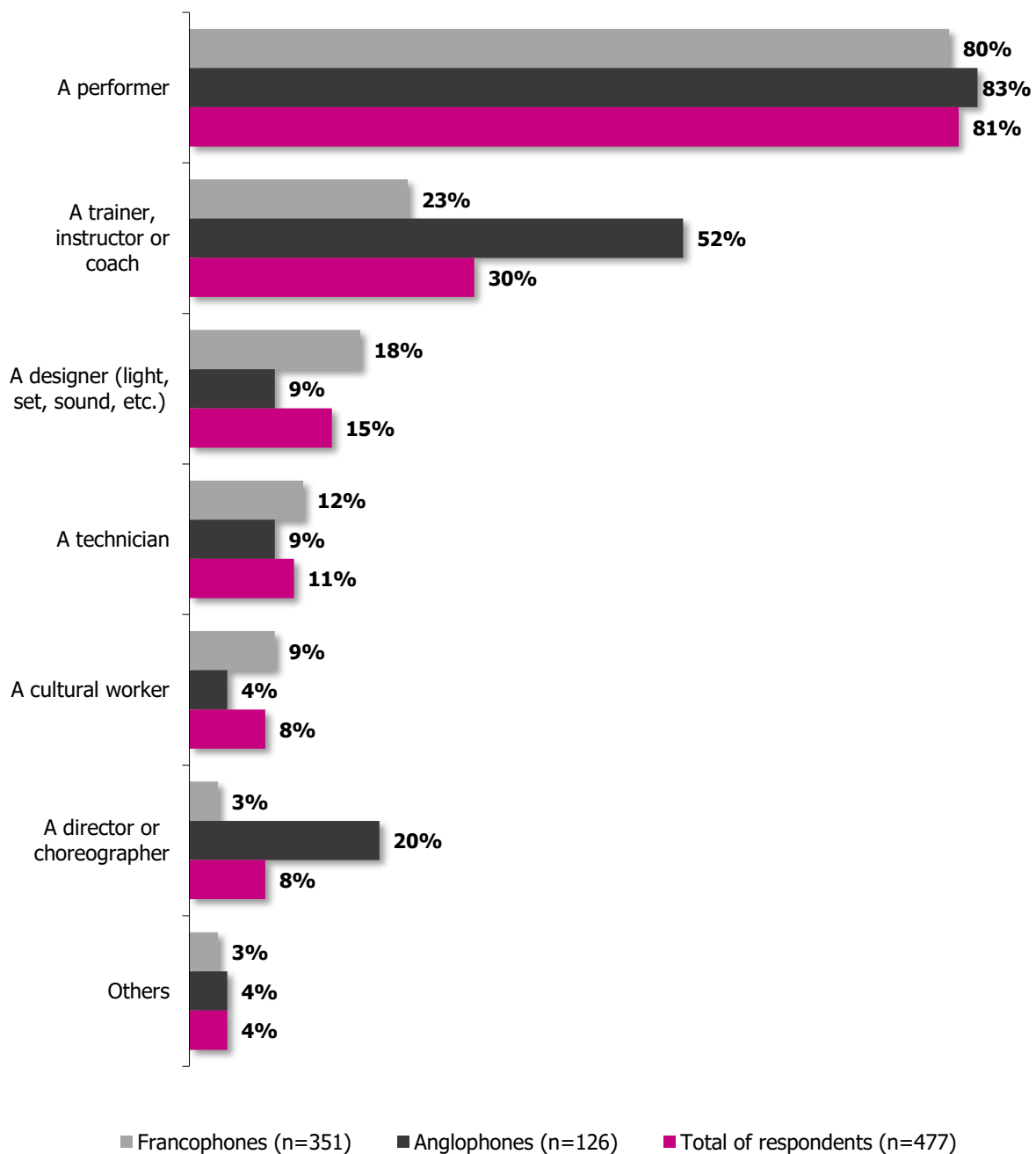
- Among twelve fields of activity, the circus arts has the highest percentage of individuals (artists, self-employed, salaried workers) who have applied or will apply for the Canadian Emergency Benefit (CEB), at 70%, compared to an average of 43%.
- Among twelve fields of practice, the circus arts rank second - tied with music and sound - in terms of the percentage of arts organizations (companies) that have applied or will apply for the Canada Emergency Response Benefit (CERB), at 41%, compared to an average of 41%.

Both the results of this survey and the survey conducted for the Canada Council for the Arts demonstrate the urgent need for major public financial intervention to ensure the sustainability of the circus arts sector.

Annex 1: Survey of artists and cultural workers

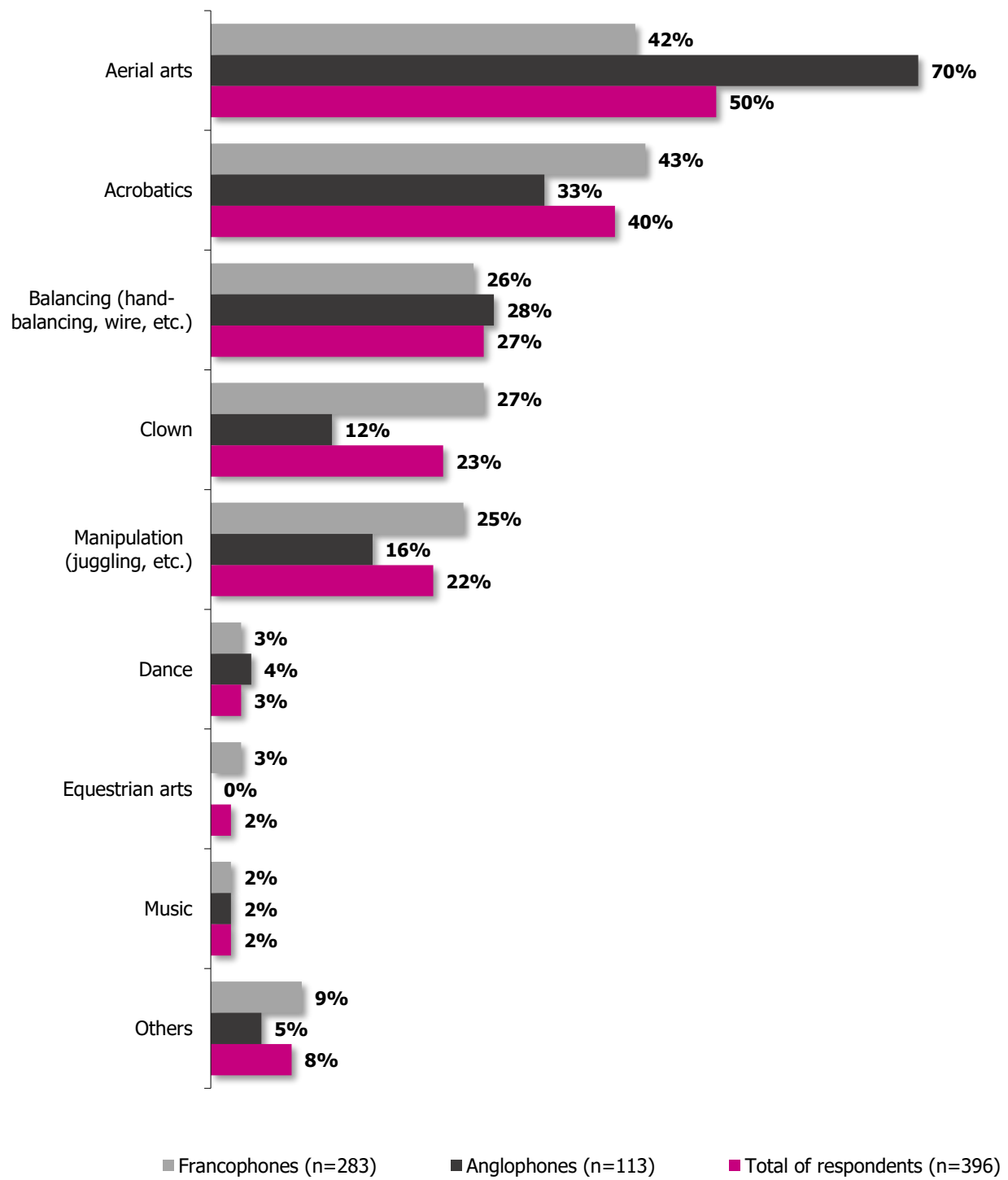
Q1 You are: (Tick all that apply)

Figure 1 - Occupation



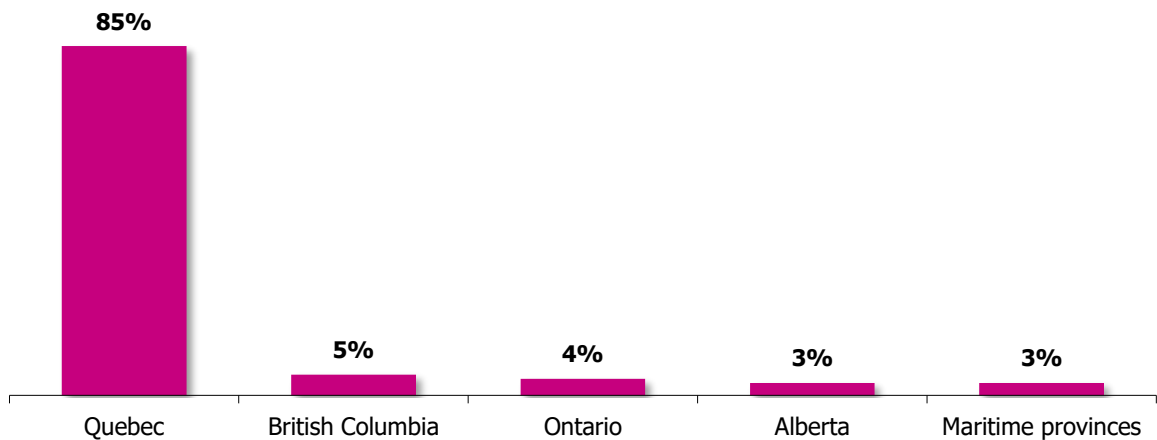
Q2 If you are an artist, your main disciplines are:

Figure 2 – Artists' main disciplines



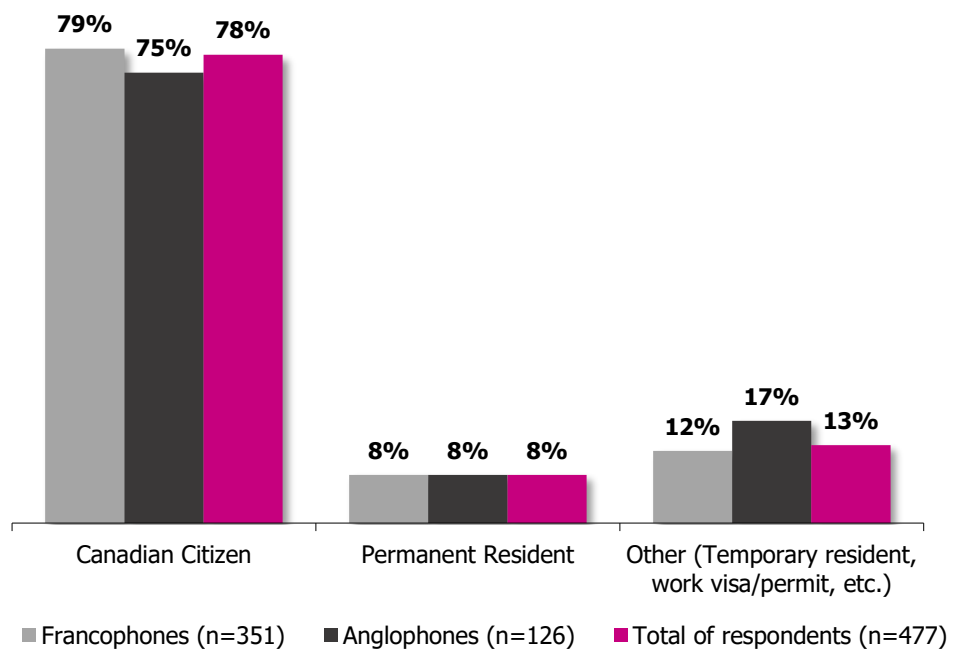
Q3 In which province do you reside?

Figure 3 - Province of residence



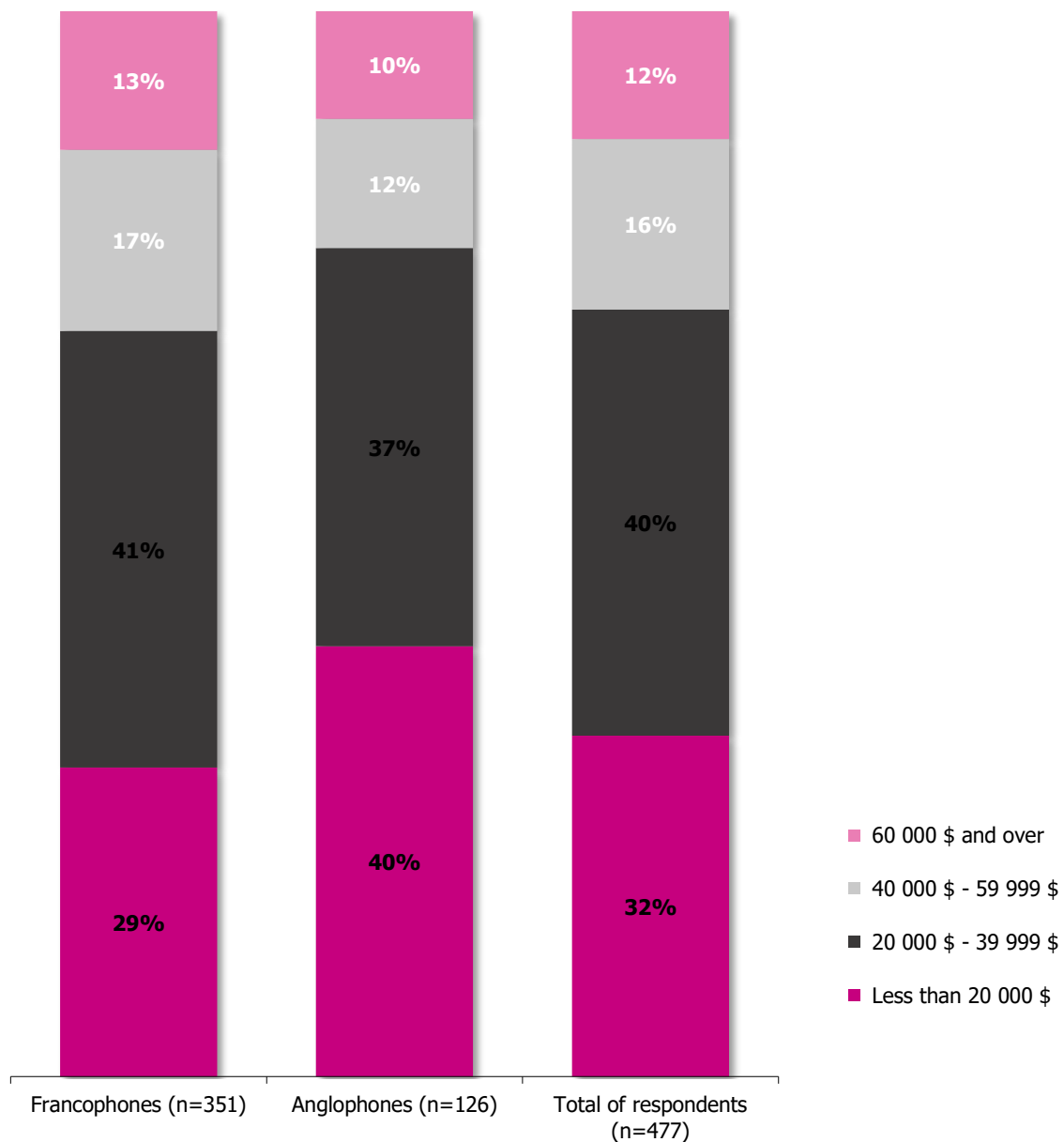
Q4 You are:

Figure 4 - Status of respondents



Q5 In 2019, what was your annual income related to your professional circus arts activities?

Figure 5 - Annual income related to your professional activities in circus arts



Q6 To the best of your knowledge, how much do you estimate your total and cumulative loss of income?

Figure 6 - Total and cumulative loss of income: average per respondent

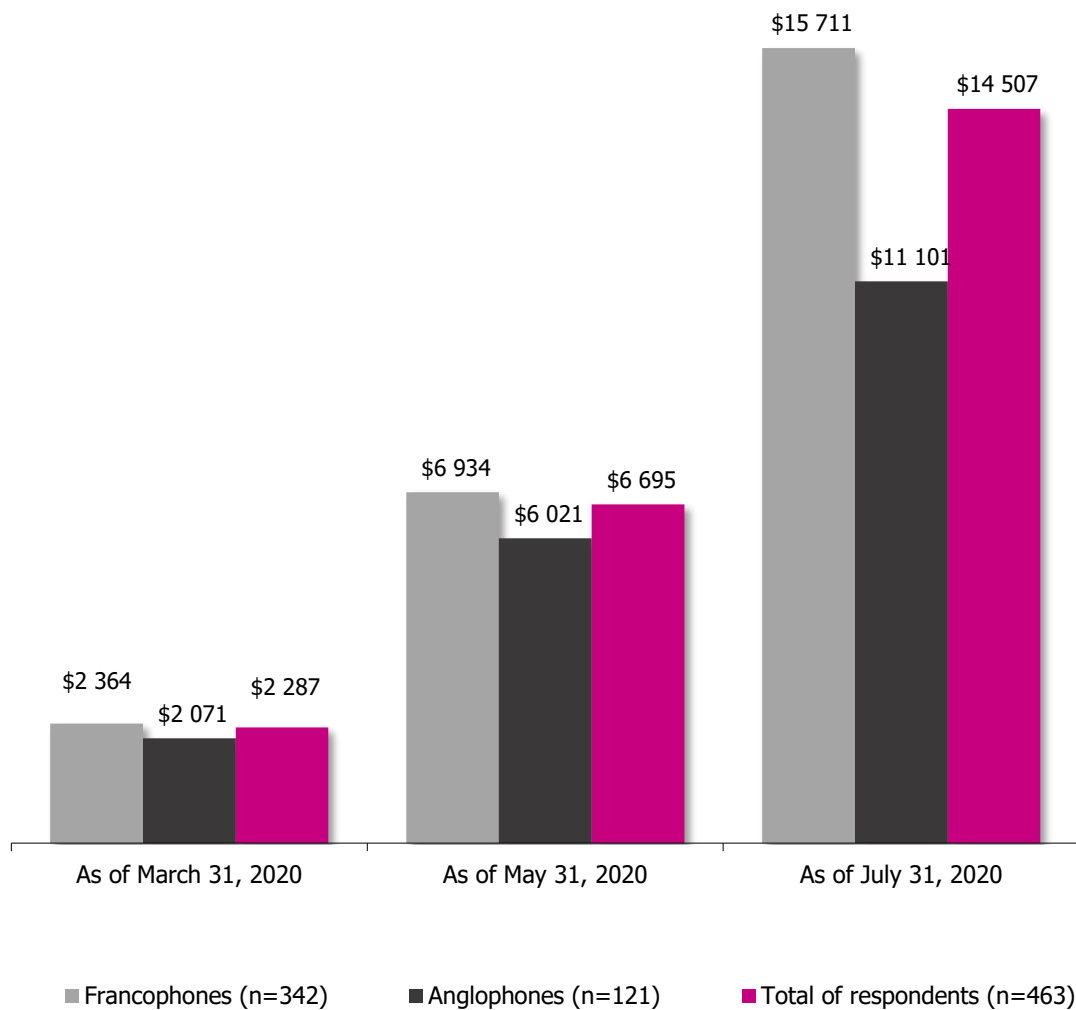
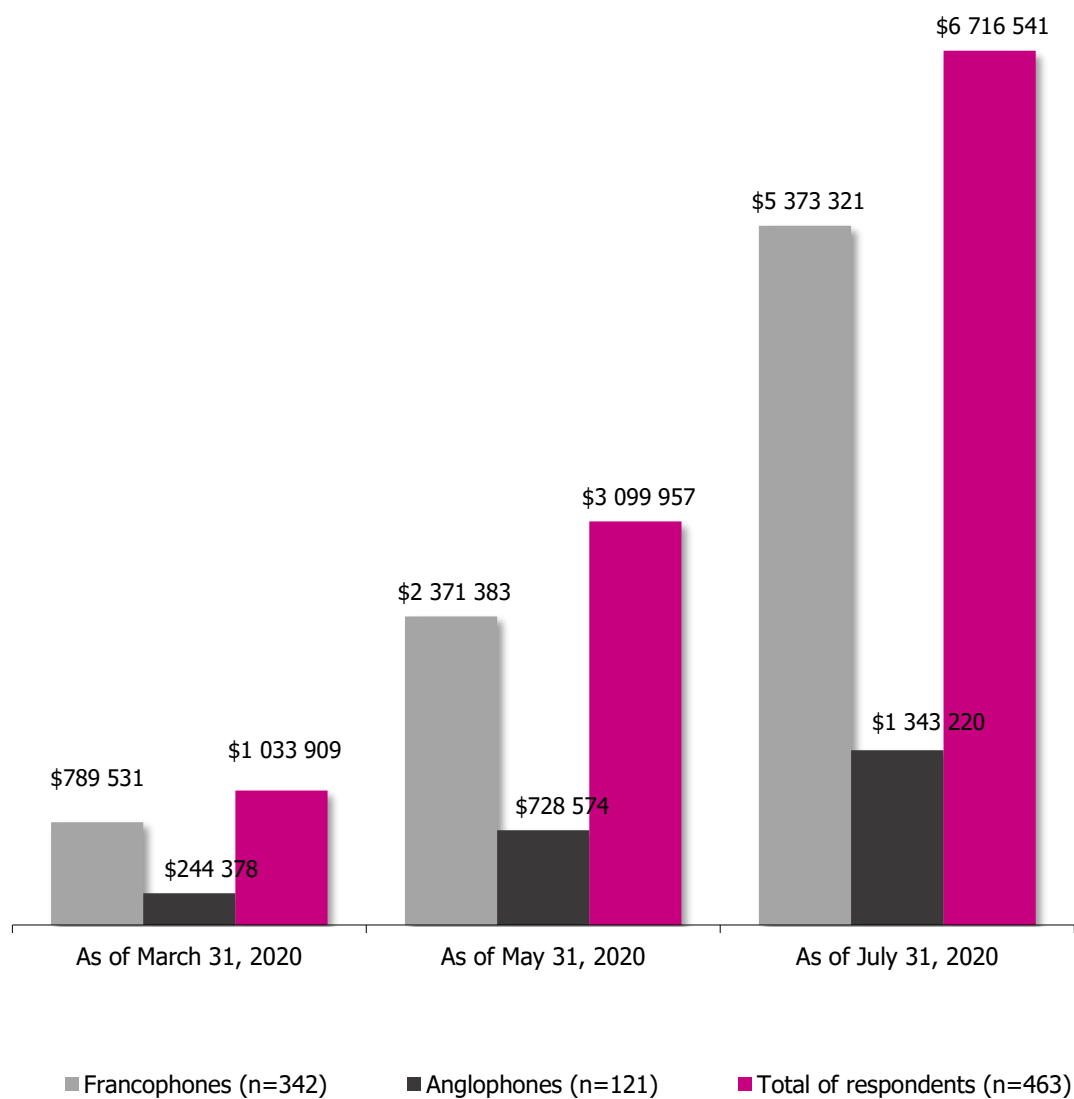
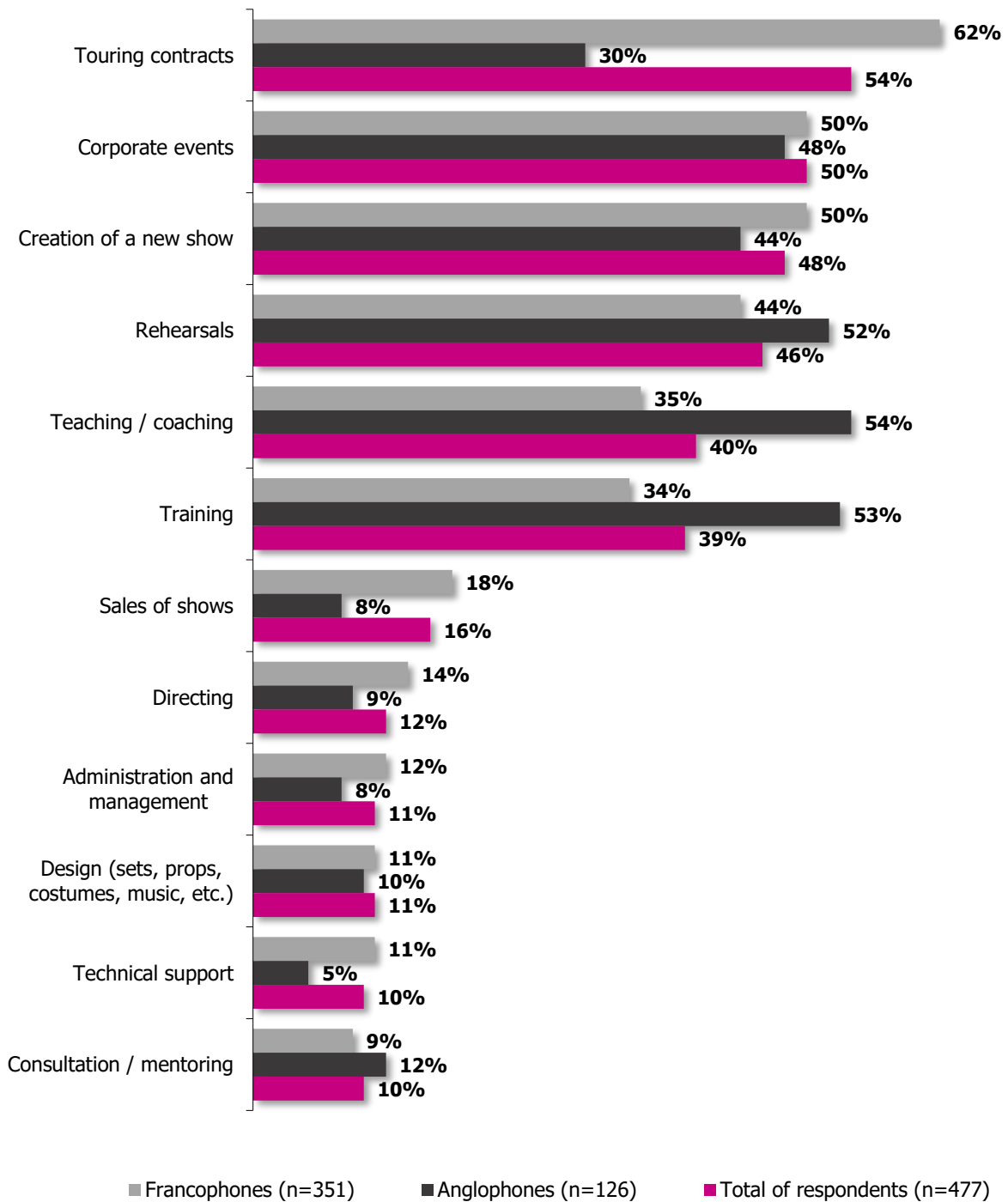


Figure 7 – Total and cumulative loss of income: total of all respondents



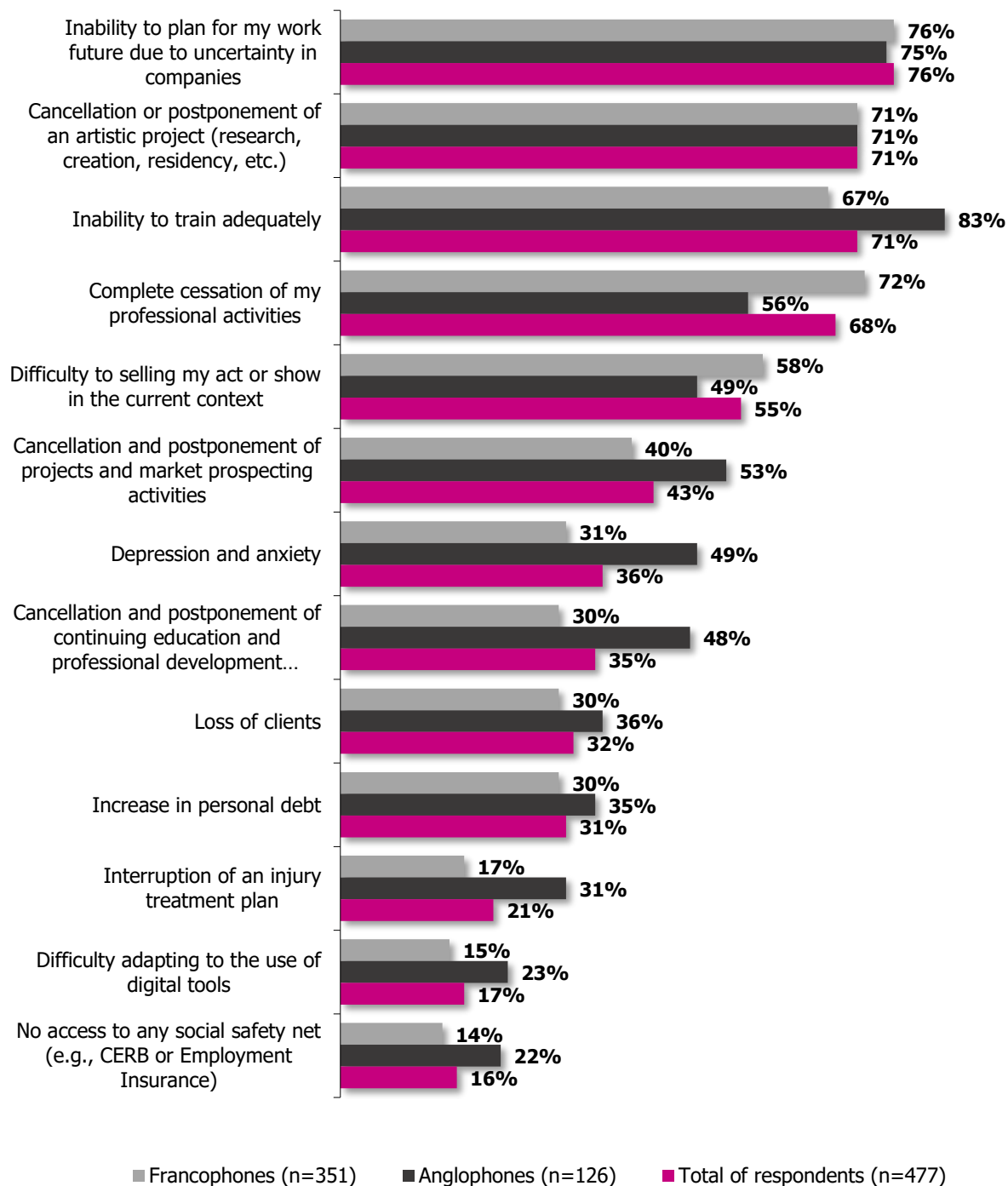
Q7 What is the nature of the contracts that you have lost? (Tick all boxes that apply)

Figure 8 - Nature of lost contracts



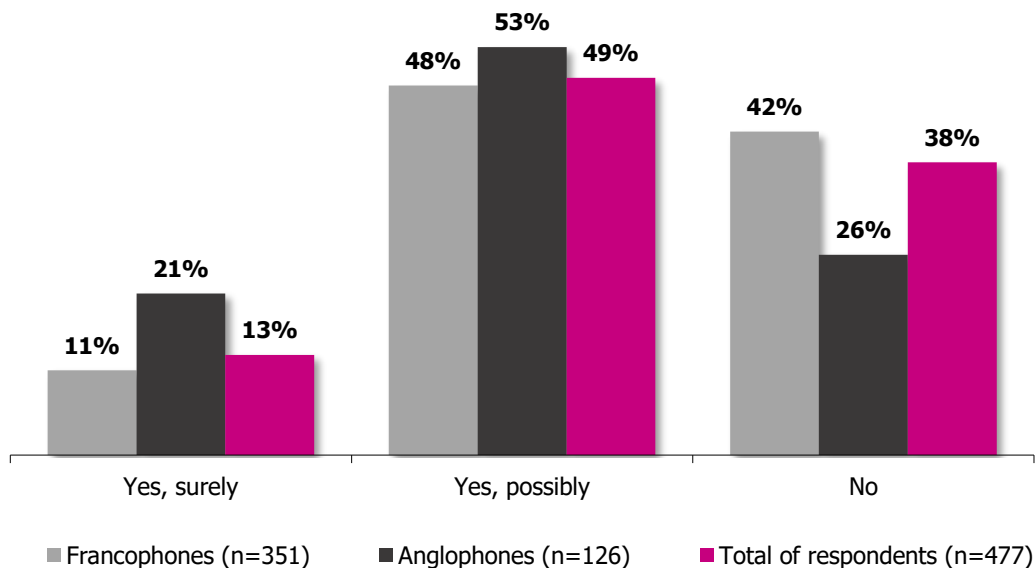
Q8 In addition to the loss of income, at other impacts have you experienced? (Tick all boxes that apply)

Figure 9 - Most significant impacts, in addition to loss of income



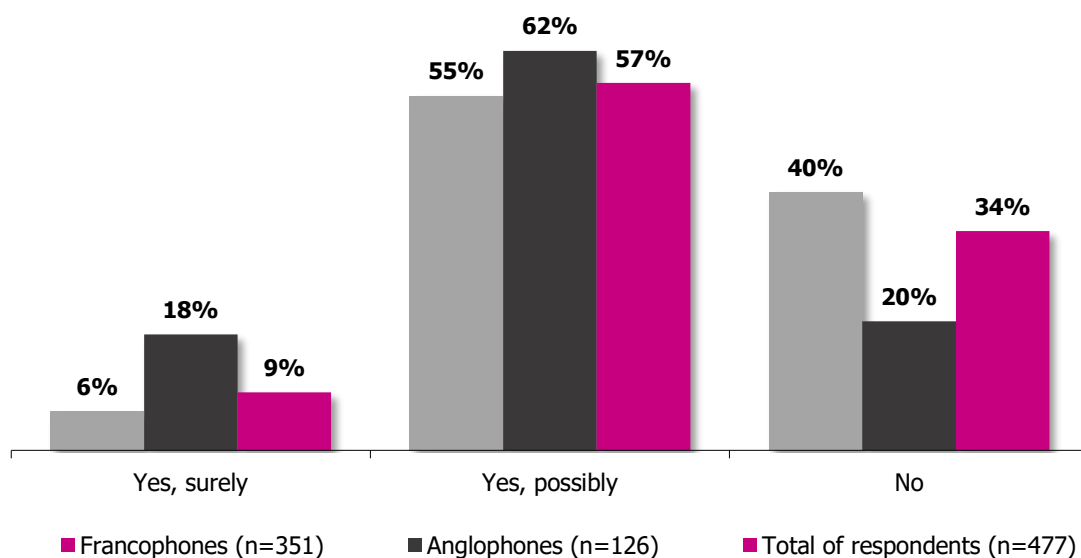
Q10 Will the financial losses incurred and estimated as at July 31 jeopardize your ability to continue your professional activities?

Figure 10 - Endangerment of the ability to continue its professional activities, because of the financial losses incurred and estimated as at July 31, 2020



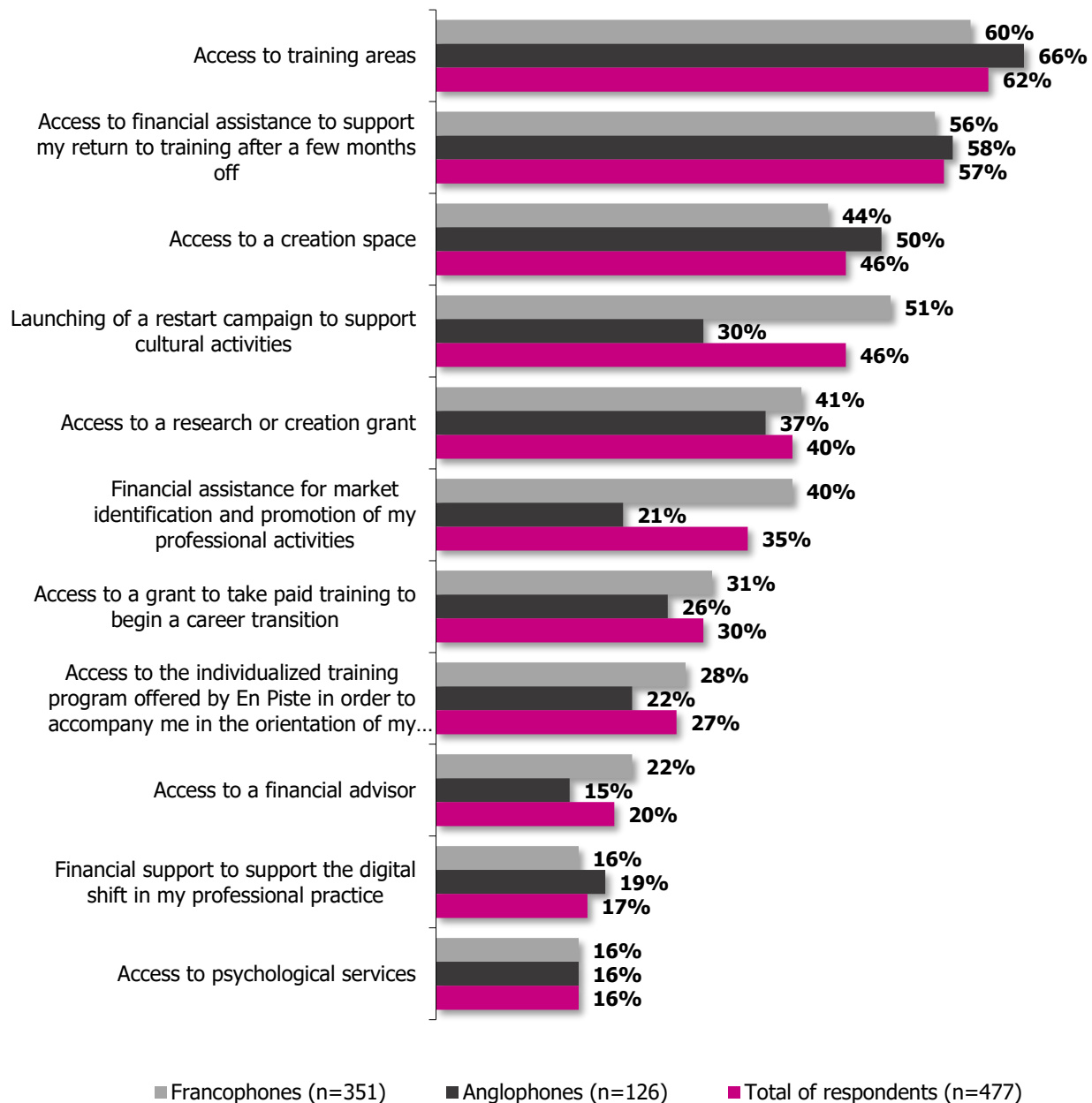
Q11 Will you need to consider a career transition?

Figure 11 - Career transition considered



Q12 In addition to the current measures put in place by governments, what will you need in order to ensure the recovery of your operations? (Tick the boxes corresponding to your top five answers.)

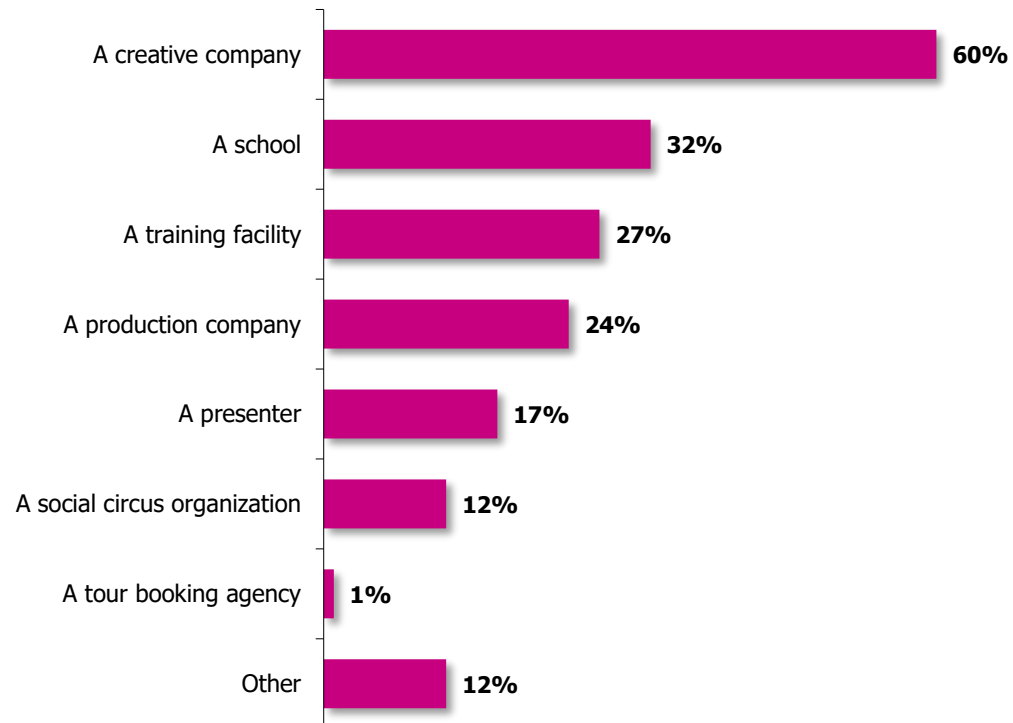
Figure 12 - Needs to ensure the recovery of operations, in addition to the current measures put in place by governments



Annex 2: Survey of organizations

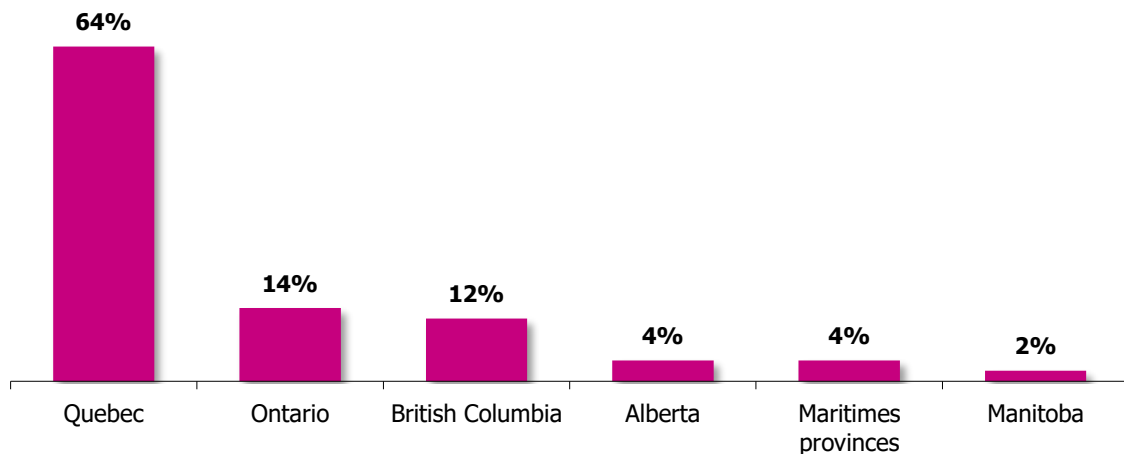
Q1 You are: (Tick all that apply)

Figure 1 - Type of company (n=84)



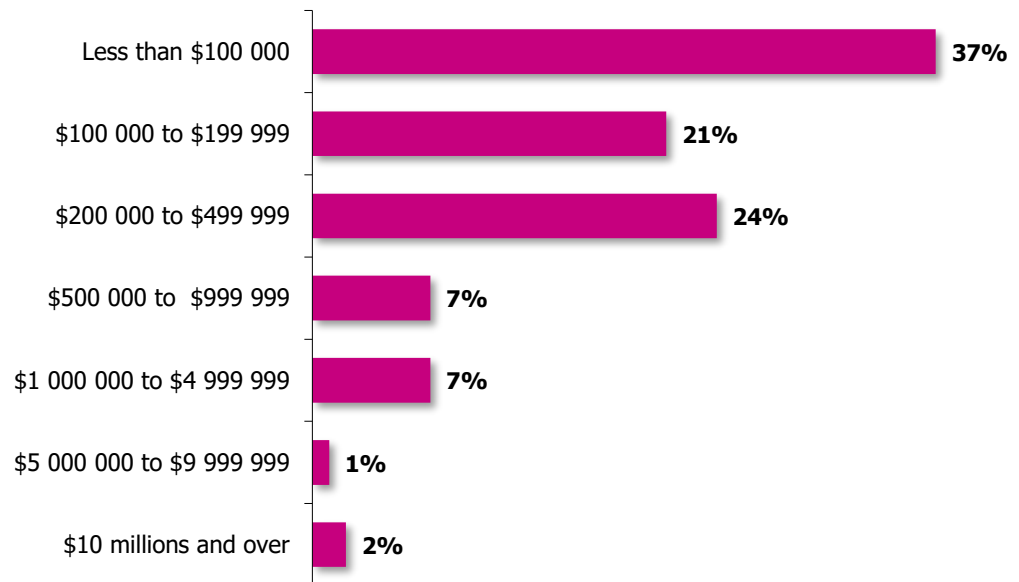
Q2 Your company is located in:

Figure 2 - Location (province) (n=84)



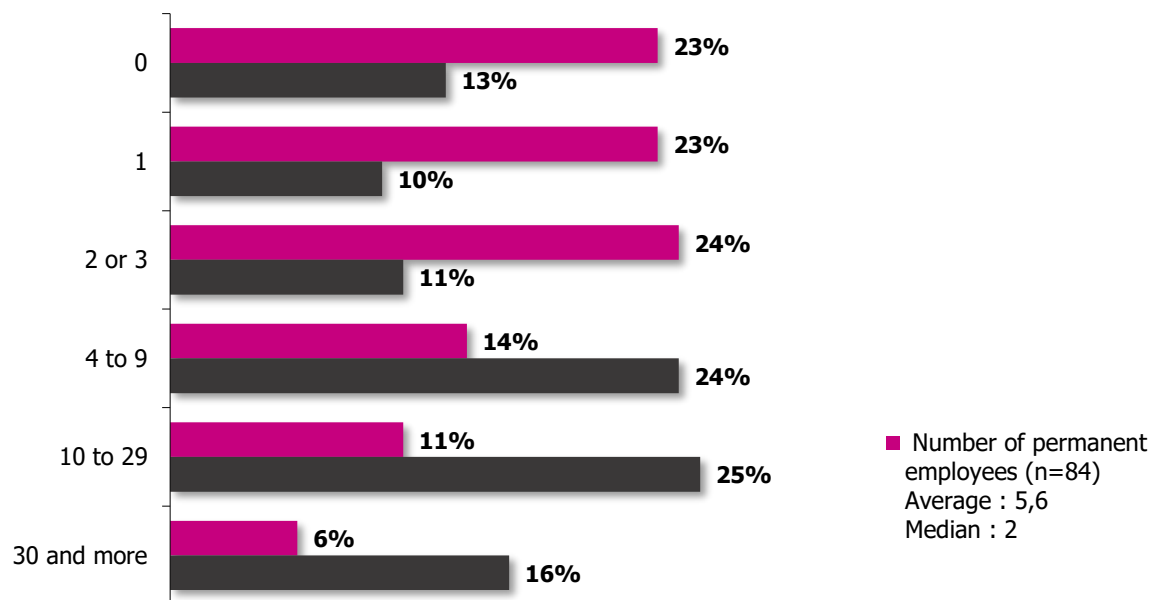
Q3 What was your company's annual turnover as of December 31, 2019?

Figure 3 - Annual turnover as of December 31, 2019 (n=84)



Q4 How many permanent employees did you have as of December 31, 2019? + Q5 How many casual employees did you have as of December 31, 2019?

Figure 4 - Number of permanent and casual employees at December 31, 2019



Q6 To the best of your knowledge, what is your estimated total and cumulative loss of income? + Q7 Of these cumulated projected losses as of July 31, 2020, what is the estimated total amount that relates to unpaid fees to artists and self-employed workers?

Figure 5 - Total and cumulative loss of income and unpaid fees to artists and self-employed workers: average per company

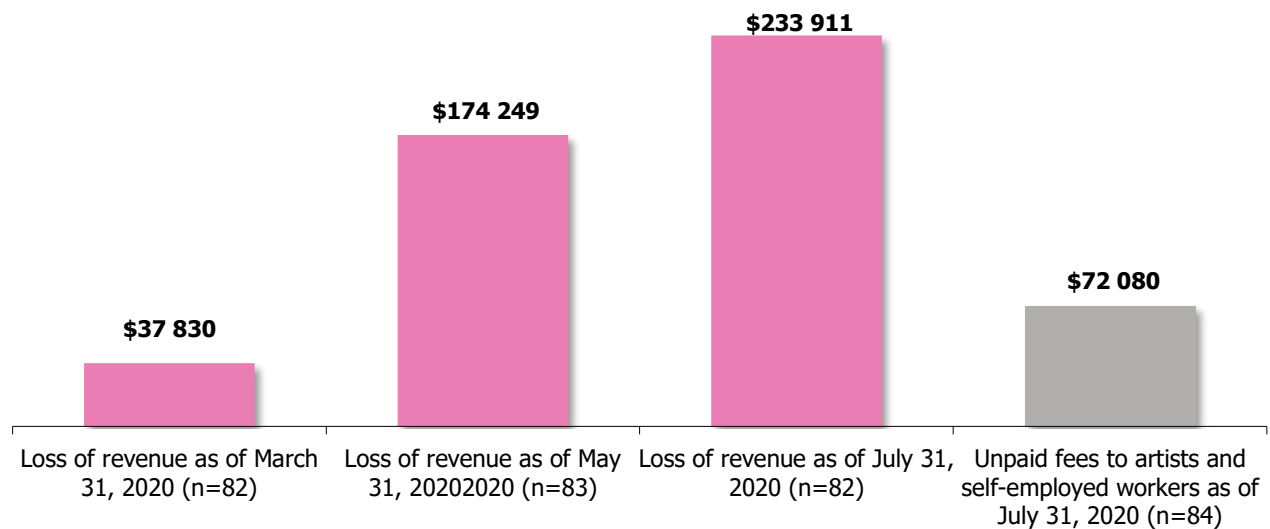
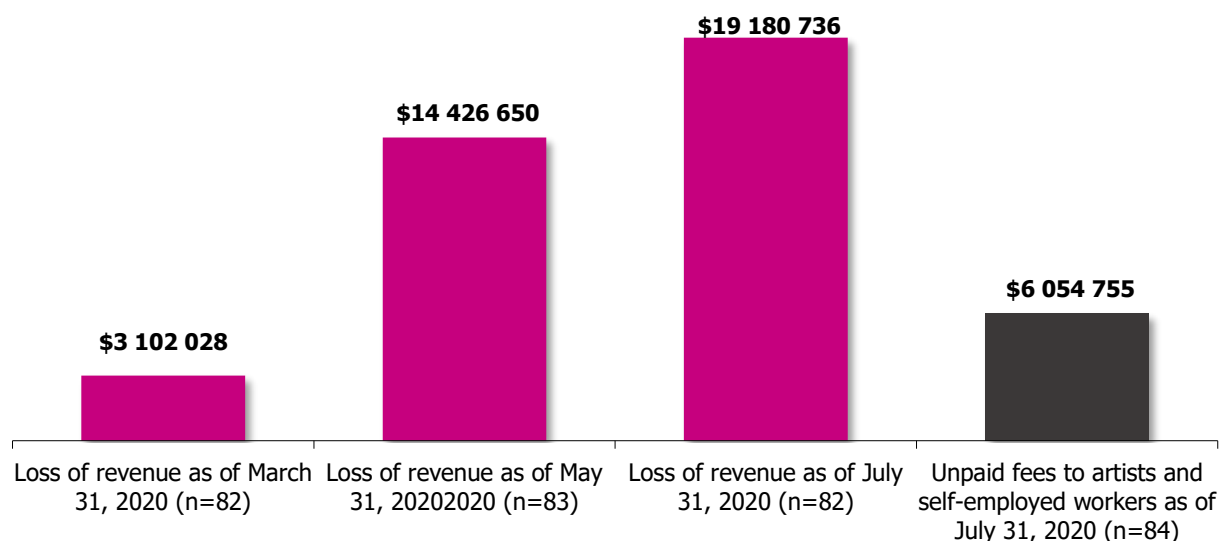
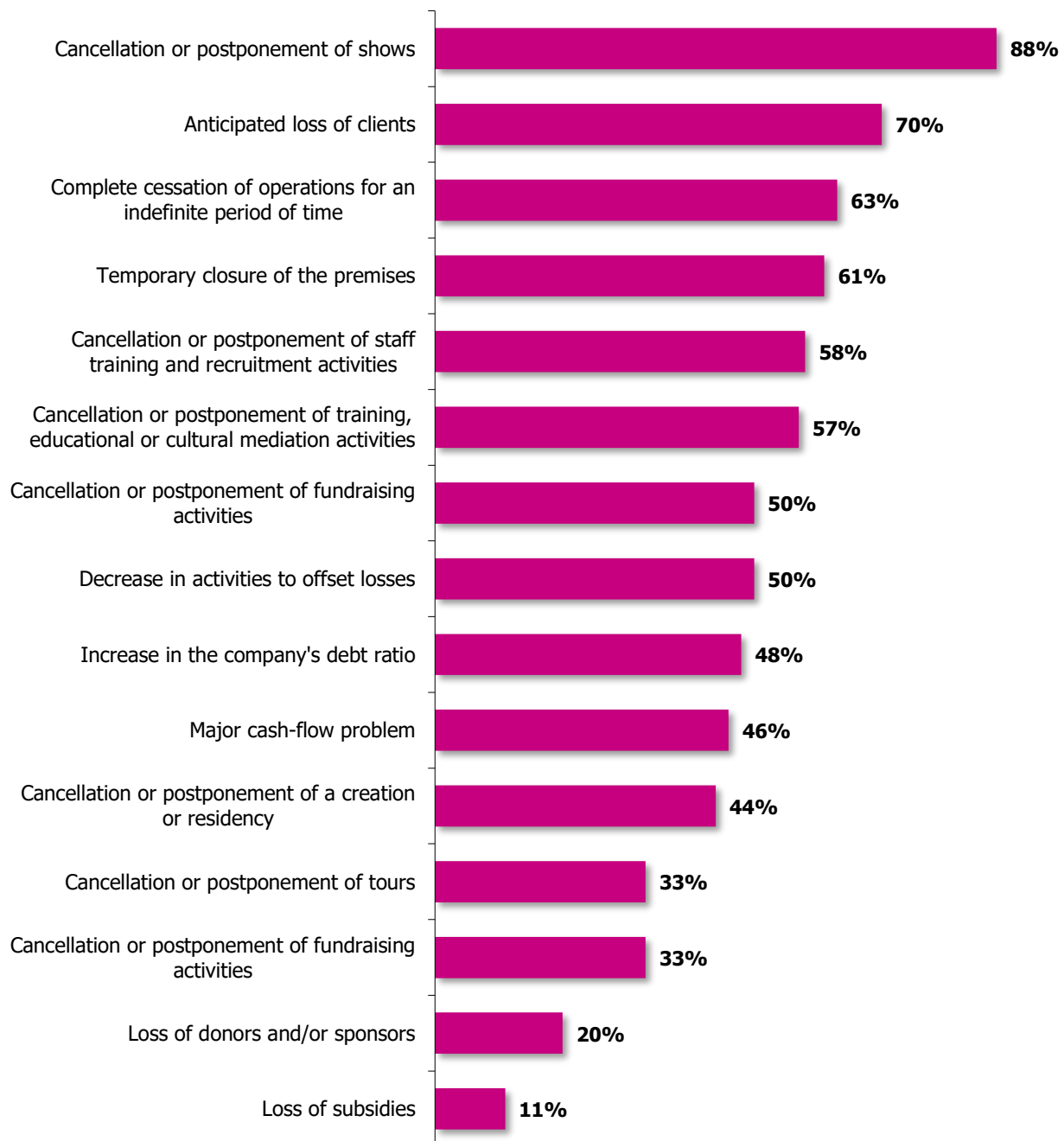


Figure 6 - Total and cumulative loss of income: cumulative for all companies



Q8 In addition to loss of revenue, what are the other direct and indirect COVID-19-related impacts on your activities? (Check all that apply)

Figure 7 - Most significant direct and indirect COVID-19-related impacts on operations, in addition to loss of revenue



Q10 How many temporary layoffs did you have to make as of March 31, 2020? + Q11 How many permanent layoffs do you estimate you will need to make by July 31, 2020?

Figure 8 - Temporary layoffs made and permanent layoffs planned: all companies combined

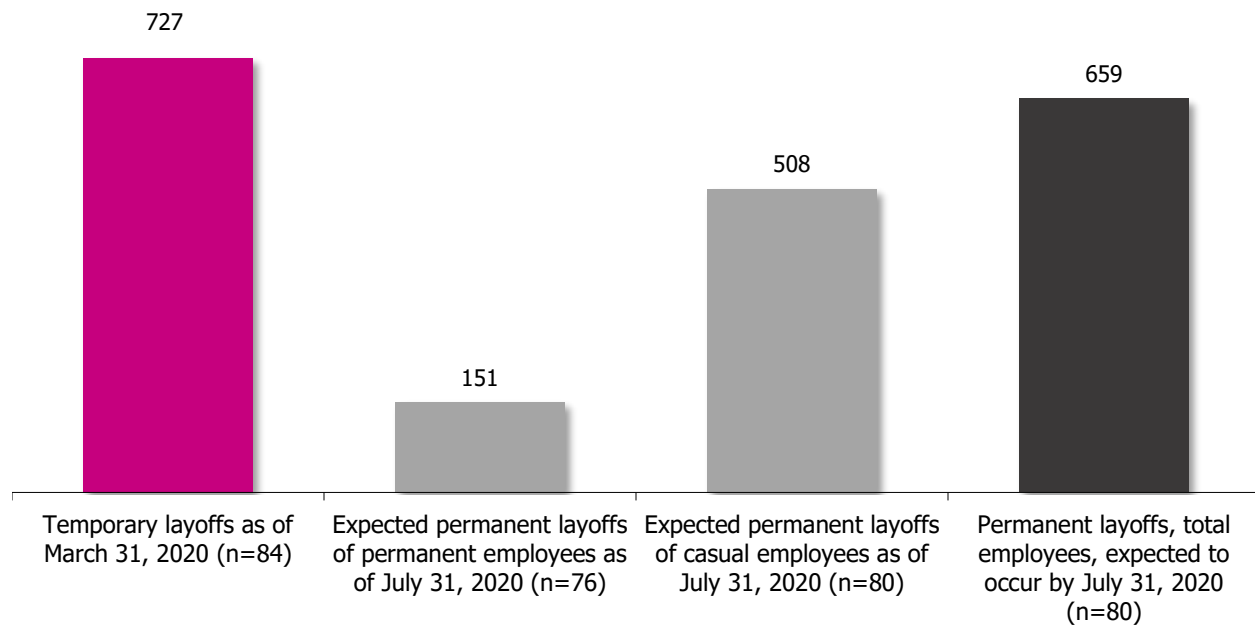


Figure 9 - Temporary layoffs made and permanent layoffs planned: average per company

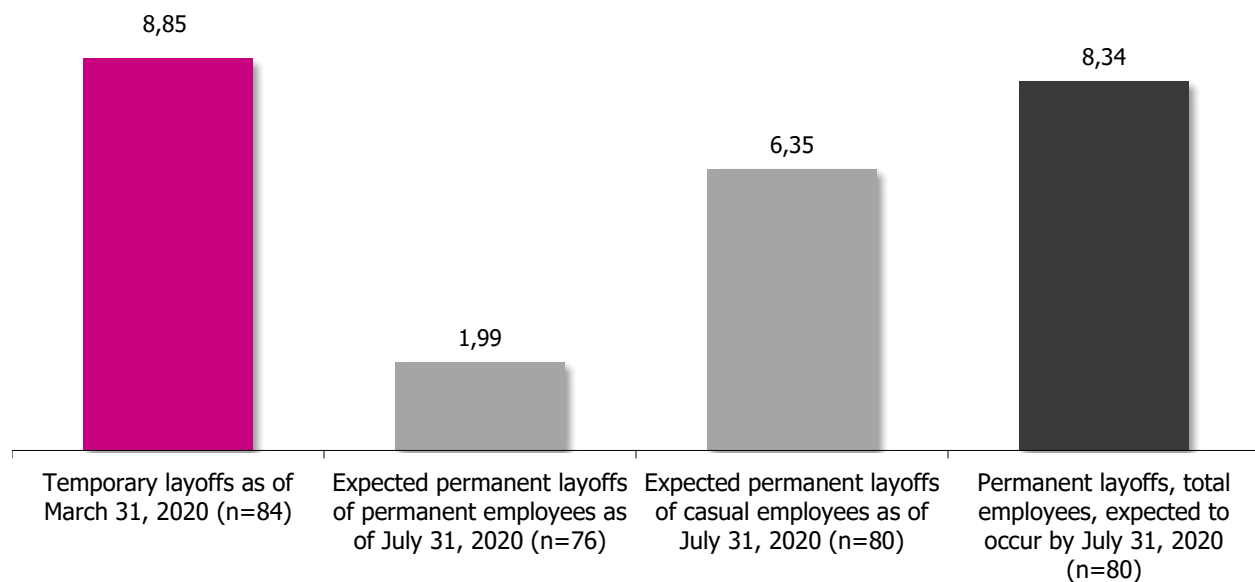
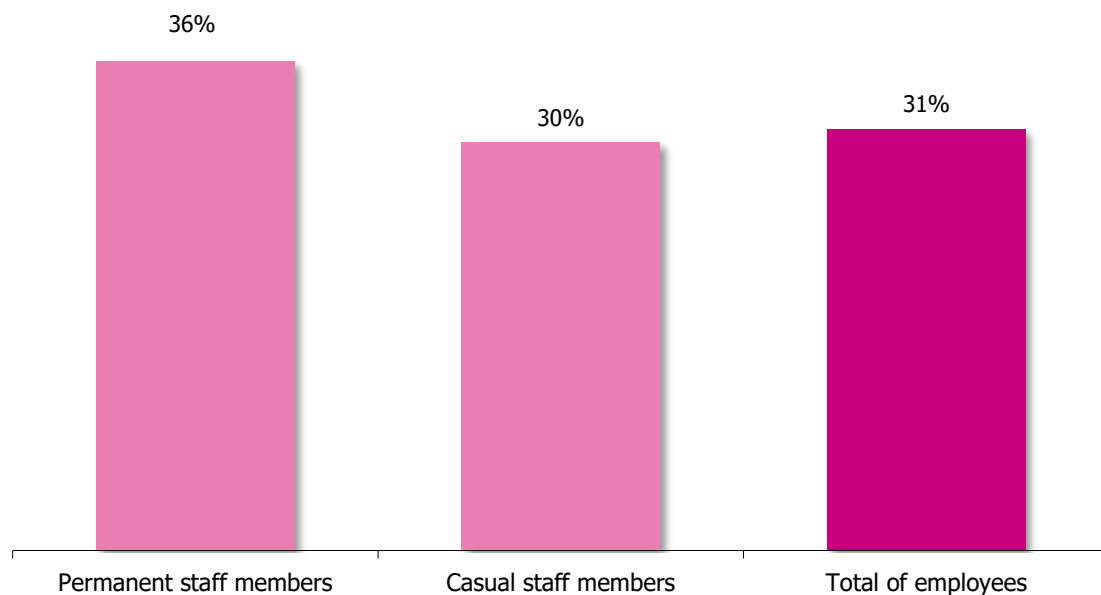
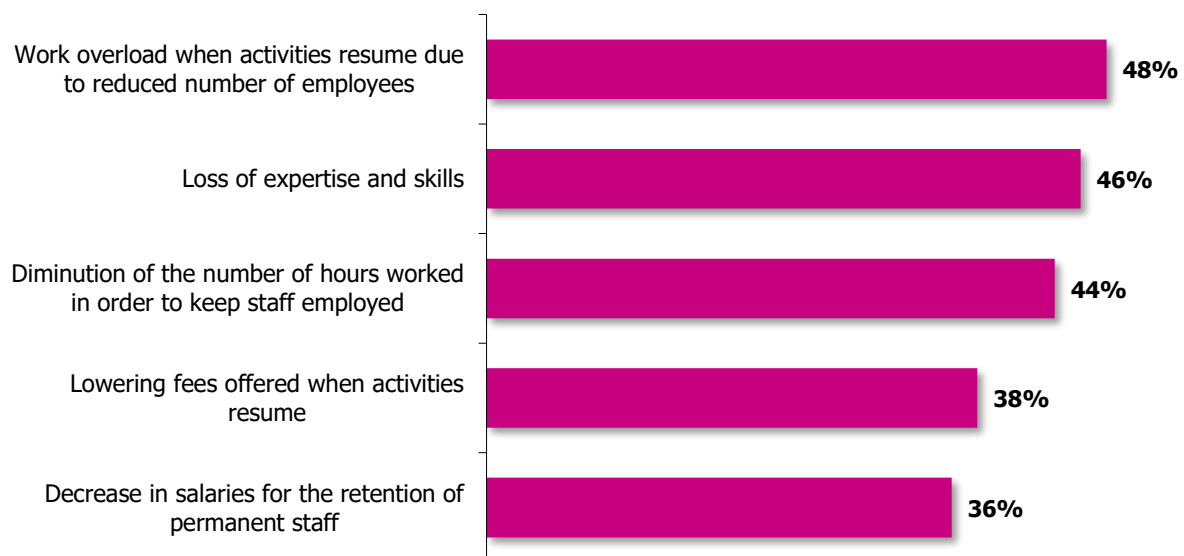


Figure 10 - Ratio: planned permanent layoffs as of July 31, 2020 / number of employees as of December 31, 2019



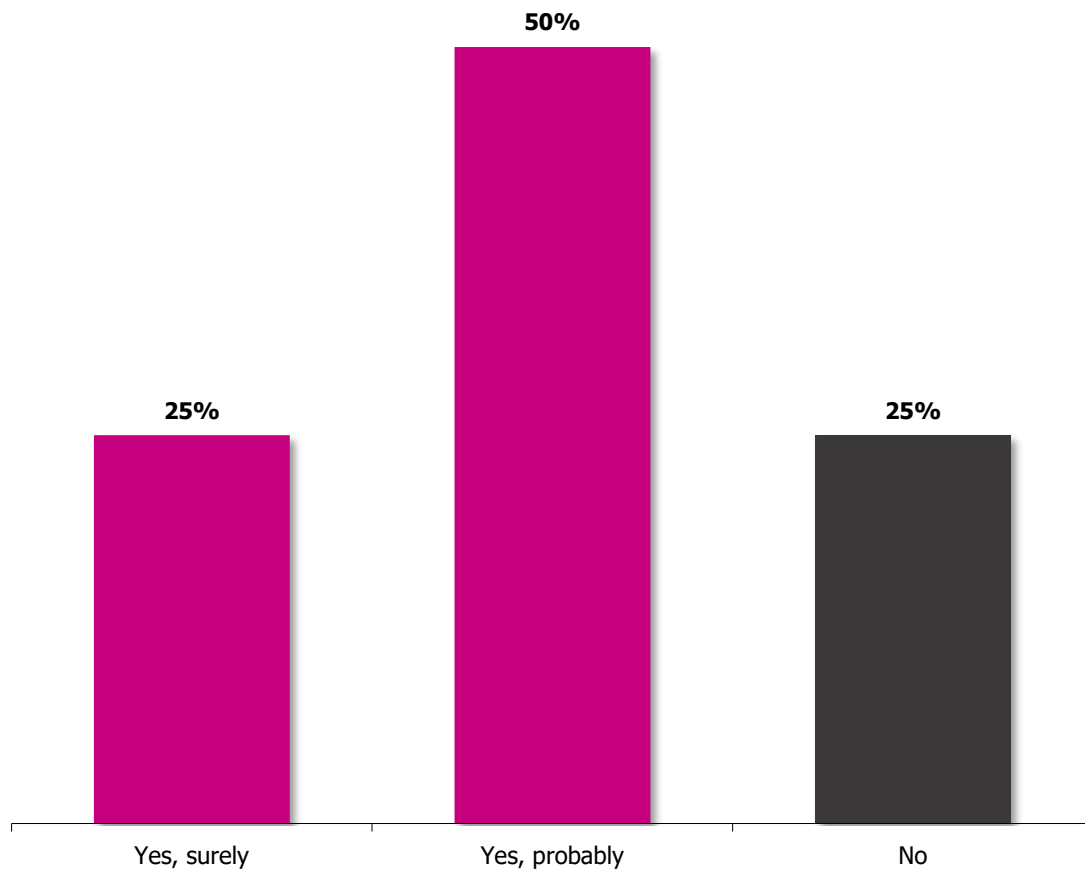
Q12 In addition to layoffs, what will be the impact on human resources? (Check all that apply.)

Figure 11 - Impacts on human resources, in addition to layoffs



Q13 Will the financial losses incurred and estimated as of July 31 jeopardize your ability to continue your operations?

Figure 12 - The ability to continue operations is jeopardized by the financial losses incurred and estimated as at July 31.



Q14 In addition to the current measures put in place by governments, what will you need in order to ensure the recovery of your operations? (Tick your top choice in those listed.)

Figure 13 - Main (most important) need to ensure the recovery of operations, in addition to the current measures put in place by governments

