

Impacts of COVID-19 on the Circus Sector

Results of a second survey of Canadian circus
professionals and organizations

December 2020

en piste

REGROUPEMENT NATIONAL DES ARTS DU CIRQUE
NATIONAL CIRCUS ARTS ALLIANCE

Table of Contents

Background and objectives	3
Methodology	3
Highlights	4
Survey of Individuals	4
Survey of Organizations.....	5
Conclusion.....	7
Appendix 1: Survey of artists and cultural workers	9
Appendix 2: Survey of organizations	26

Background and objectives

In the context of the COVID-19-related crisis, En Piste, the National Circus Arts Alliance considers that representing the interests of the circus arts sector is fundamental to supporting the community in this unprecedented crisis. In April 2020, a first survey assessing the impact of the crisis and its effects on companies, artists, and self-employed workers demonstrated the dramatic consequences of this crisis on the future of the circus arts sector. In November and December 2020, a second survey was conducted in order to:

- Update data on the impact of the pandemic;
- Know the measures put in place to compensate for the cessation of activities of companies, artists and self-employed workers;
- Identify incentives and programs that could contribute to the recovery of the circus arts sector.

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

Methodology

Target population

The survey universe consists of two groups:

- Individuals, mainly composed of self-employed workers, artists, trainers, directors, designers, technicians, etc. The survey was sent to 607 individuals.
- Organizations, for example, artistic companies, production agencies, schools, social circus organizations, presenters, festivals, etc. The survey was sent to 121 organizations.

Collection method and period

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

The collection period took place from November 23 to December 7, 2020.

Participation rate and margin of error

- In the case of individuals, 320 questionnaires were completed, for a participation rate of 53%. For information purposes, the margin of error is 3.8%.

- In the case of organizations, 61 questionnaires were completed, for a participation rate of 50%. For information purposes, the margin of error is 8.8%.

A total of 381 respondents participated in the survey. These are 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.

Highlights

Survey of Individuals¹

- Data on the respondents' profiles:
 - 80% reside in Quebec and 86% are Canadian citizens.
 - 82% are performers, 34% are trainers, instructors or coaches, 21% are directors or choreographers, and 13% are designers.
- On average, annual income from circus arts decreased per respondent from \$38,340 in 2019 to \$13,340 in 2020, a decrease of 65%.
- For the same period, income earned in Canada decreased on average from \$22,736 to \$10,512 (54% decrease) while income earned outside of Canada decreased from \$15,604 to \$2,828 (82% decrease). The share of income earned outside of Canada went from 41% to 21%.
- Since the beginning of the COVID-19-related crisis, income losses related to show cancellations or interruption of professional activities have averaged \$29,543 per respondent.
- The main types of contracts lost are: touring shows (64%), corporate events (59%), creation and development of new shows (56%), rehearsals (46%), and teaching/coaching (43%).
- In the context of COVID-19, 67% of respondents did not apply for any grants and 16% had their grant applications declined.
- In addition to loss of income, the most significant impacts of the pandemic reported by respondents are: inability to plan for the future of their career due to uncertainty within companies (85%), inability to practice their craft (83%), cancellation or postponement of artistic projects (research, creation, residency, touring, etc.) (80%), depression and anxiety (65%), inability to train adequately (58%), and inability to create (48%).
- 77% per cent of respondents felt that the financial losses incurred and estimated as of December 31, along with the end of the wage subsidy program, jeopardized their ability to continue their work activities (23% definitely, 54% possibly). This represents a 15-point increase from the survey conducted in April 2020 (62%).

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

- 94% of respondents are considering a career transition. Of these, 33% definitely wish to remain in the circus arts sector. 33% also wish to remain in the circus arts sector, but lack of employment prevents them from doing so.
- Since the beginning of the pandemic, 81% of respondents reported they have received the Canada Emergency Response Benefit. 19% have received Employment Insurance, and 20% have received paid training through a provincial program.
- Among the professional activities carried out prior to COVID-19 that respondents were able to pursue were: training (51%), teaching and coaching (30%), creating a new act or show (27%), presenting an outdoor or on-site show (24%), and continuing education activities (23%).
- New work activities that respondents have undertaken or have had to undertake since COVID-19 include: job hunting (38%), working a new job in another field (29%), returning to school (22%), developing a digital and/or audiovisual project (21%), and teaching or coaching (19%).
- In addition to the current governmental measures, the main needs to ensure the recovery of professional activities are: access to an extended wage subsidy until professional activities can be resumed (68%), access to training facilities (56%), access to a research or creation grant (48%), access to an artistic creation venue (48%), and access to financial assistance to support training costs (42%).

Survey of Organizations²

- Data on their profiles:
 - 77% completed the survey in French and 77% are located in Quebec
 - 60% are artistic creation companies or production agencies, 38% are schools 16% are social circus organizations, and 17% are presenters or festivals
- On average, sales decreased per organization from \$1,635,213 for the fiscal year ended in 2019 to \$803,008 for the current fiscal year, a decrease of 51%.
- For the same period, sales generated in Canada decreased on average from \$1,149,555 to \$750,812 (35% decrease) while sales generated outside of Canada decreased from \$485,658 to \$52,196 (89% decrease). The share of revenues generated outside of Canada decreased from 30% to 7%.
- Also for the same period, own-source revenues, excluding donations and sponsorships, decreased from \$1,231,315 to \$267,402 (78% decrease) while grant revenues increased from \$340,124 to \$493,047 (45% increase). The share of own-source revenues (excluding donations and sponsorships) increased from 75% to 33%.
- In total, losses incurred during the current fiscal year compared to the fiscal year ending in 2019 amount, on average per organization, to \$832,205 for sales and \$963,913 for own source revenues excluding donations and sponsorships.

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

- Among organizations headquartered in Quebec, 70% did not benefit from the \$10 million in financial assistance: 37% were not eligible for CALQ programs and 33% did not benefit from any new grants.
- On average per responding organization, the number of spectators reached decreased from 159,202 for the 2019 fiscal year to 9,505 for the current fiscal year, a decrease of 94%.
- For the same period, the number of spectators reached within Canada decreased on average from 44,756 to 7,169 (84% decrease) while the number of spectators reached outside of Canada decreased from 114,446 to 2,336 (98% decrease). The proportion of spectators reached outside of Canada increased from 72% to 25%.
- Over the same period, the average number of participants reached in teaching programs or other pedagogical activities (educational institutions or social circus companies) decreased from 3559 to 834 (a 77% decrease).
- On average per responding organization, the total number of employees decreased from 31.1 in the fiscal year ended in 2019 to 14.6 in the current fiscal year, a decrease of 53%. The number of permanent employees decreased from 6.2 to 4.6 (26% decrease) while the number of casual employees decreased from 24.9 to 10.0 (60% decrease).
- In addition to the loss of revenue and the toll on human resources, the most significant impacts of the pandemic on activities reported are: changes in the programming of activities (87%), cancellation or postponement of dissemination activities (71%), cancellation or postponement of training activities (66%), cancellation or postponement of creative activities (64%), development of new activities (59%), and reduced activities to compensate for lost revenue (57%).
- The most predominant consequences on human resources are: reduction in the number of paid hours to keep staff employed (51%), loss of expertise and skills (51%), introduction of teleworking and revision of management methods (49%), and work overload due to the decrease in the number of employees (48%).
- Since the beginning of the pandemic, 51% of responding organizations have received a wage subsidy or employment assistance grant, 41% have received a federal business loan, 33% have received a grant from the Canada Council for the Arts grant, 30% have received a grant from a provincial arts council or other provincial funding body, and 25% have received cultural assistance from a municipality and/or municipal arts council.
- Among the activities carried out prior to COVID-19 that organizations were able to pursue, the most common were: training activities (36%), touring an outdoor or site-specific show (31%), opening studios for professional training (30%), presenting an outdoor or site-specific show (30%), and participating in or market development activities (30%).
- Among the new activities put in place to ensure the survival of the organization or the maintenance of activities during the pandemic, the most common are: participation in a film or in the recording of a show (31%), participation in symposiums, conferences or consultations to develop networks (30%), the creation

of a new show (28%), the development of a new digital project (28%) and the creation of a new digital show (26%).

- In addition to the current measures put in place by governments, the main needs to ensure the resumption of operations are: access to an operating grant for organizations (57%), employability assistance until the end of the pandemic and the return to normal activities (38%), financial assistance for the creation of a new show (34%), increased financial assistance for the organization's operations (33%) and financial assistance to support artist training (33%).
- 44% of responding organizations believe that, without additional financial support, they will no longer be operating in the next six months.
- If no additional funding is allocated after March 31, 2021, only 39% of organizations will continue to operate. The remainder will cease operations, with (12%) or without (47%) closure, or will claim bankruptcy (2%).

Conclusion

After nine months of the pandemic, the impacts of COVID-19 are proving to be extremely dramatic for the circus arts sector, both for organizations and individuals. The degree of precariousness - already very high at the time of the April 2020 survey - has increased dramatically to the point where the survival of the sector is in serious jeopardy. Before the pandemic, it was one of the most flourishing sectors.

- The circus-related income of individuals (artists, trainers, designers, etc.) has dropped by 65%. More than 80% of the individuals who responded report being unable to plan their professional futures and practice their craft, and two thirds suffer from depression or anxiety. More than nine in ten respondents are considering a career transition, although the majority would like to remain in the sector.
- For responding organizations, while their total revenues (which include grants) decreased by 51%, their own-source revenues dropped drastically (-78% or an average loss of \$963,913). As for the number of spectators reached, it collapsed (-84%, but -98% outside of Canada). That's without counting the consequences on human resources (53% reduction in the number of employees, reduction in paid hours, loss of expertise, work overload). More than 60% of organizations say they will cease operations if no additional funding is allocated to them after March 31, 2021.

Before the pandemic, Canadian circus arts represented one of the most promising sectors and was a symbol of excellence, both in Canada and internationally.

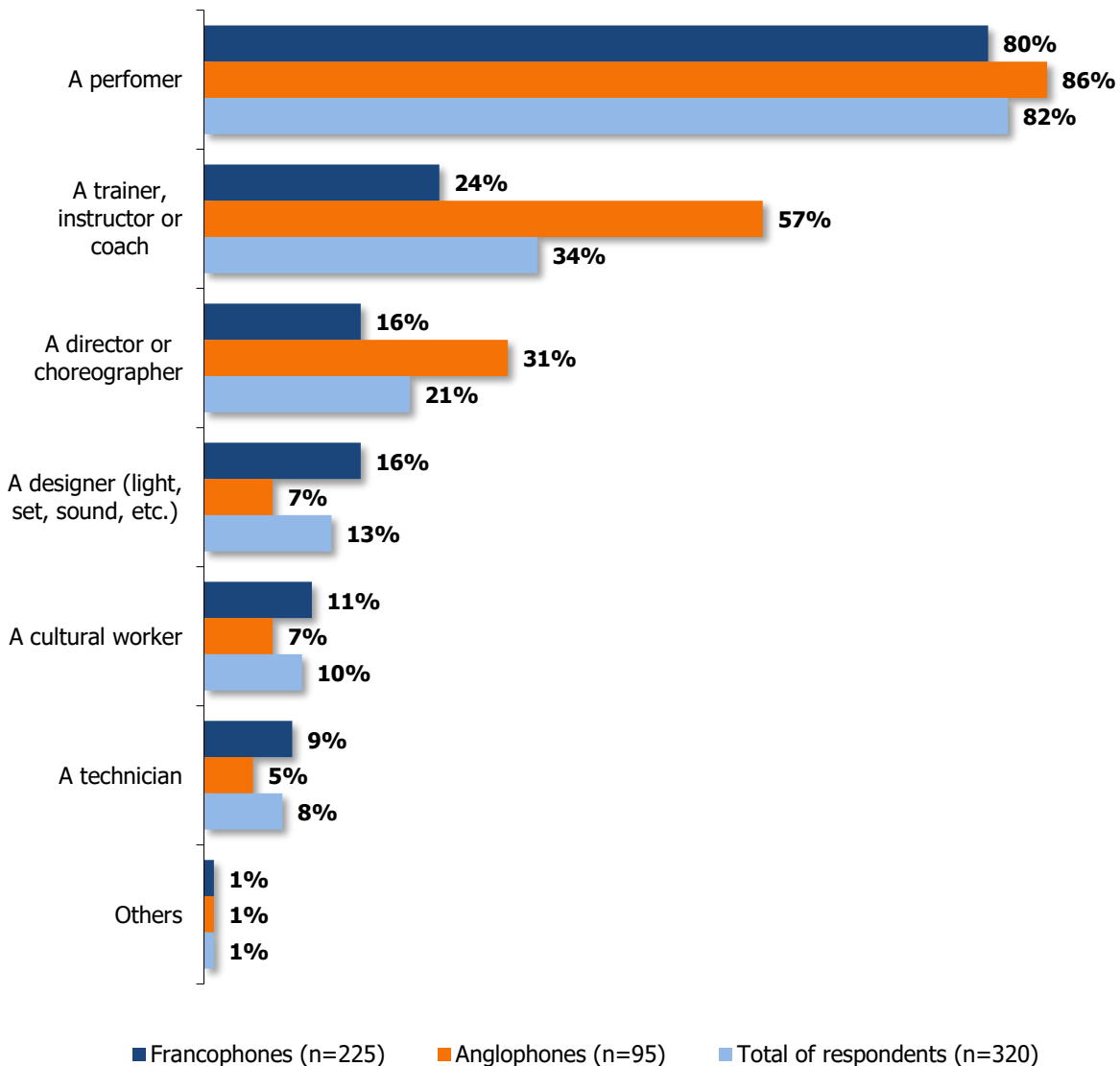
These surveys show, beyond any doubt, that an entire ecosystem is in peril. This is why drastic financial measures that are better adapted to organizations (operating grants, employability assistance, financial assistance for creation, etc.) and individuals (extended wage benefits, access to training and creation venues, research and creation grants, etc.) are essential to mitigate the economic downturn prevailing in this

sector. Its medium-term survival is at stake if nothing is done to support it and to help it rebuild and work towards recovery.

Appendix 1: Survey of artists and cultural workers

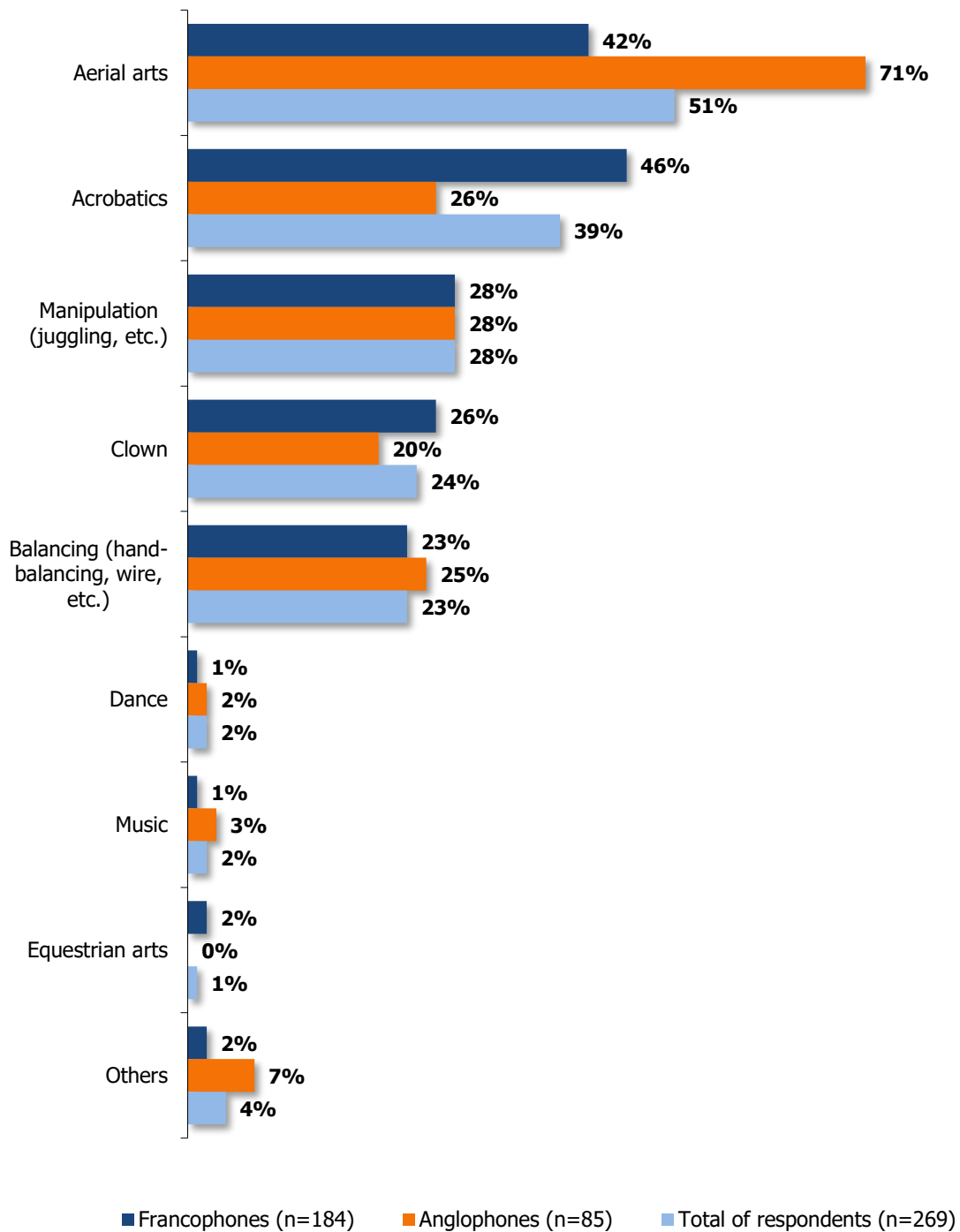
Q1 You are: (Tick all boxes that apply)

Figure 1 – Occupation



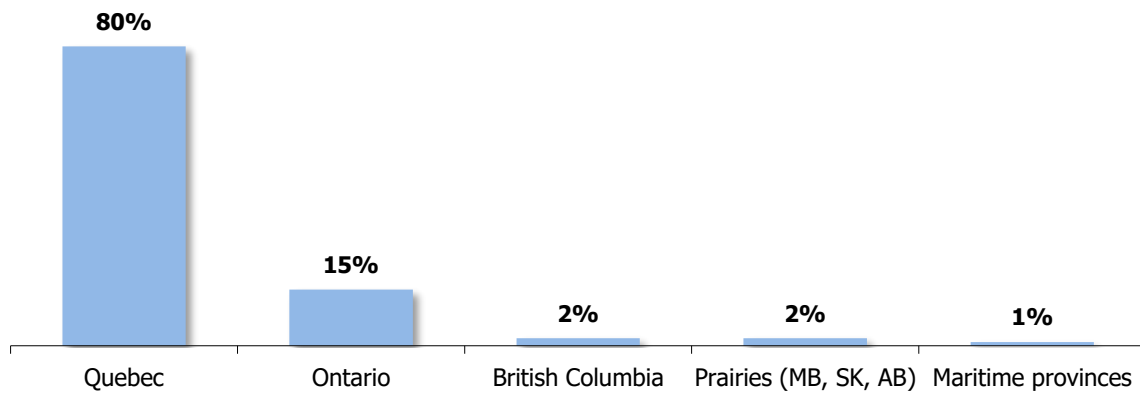
Q2 If you are an artist, your main disciplines are:

Figure 2 - Artists' Main Disciplines



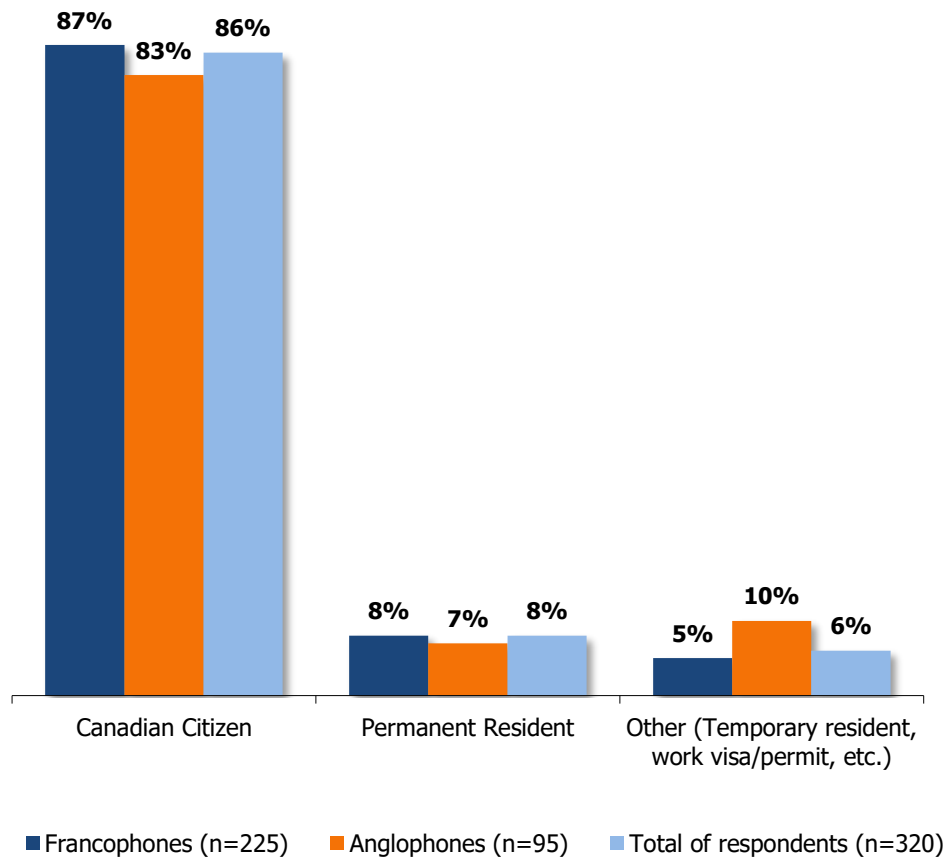
Q3 In which province or territory do you reside?

Figure 3 - Province of Residence (n=320)



Q4 You are:

Figure 4 - Respondent Status

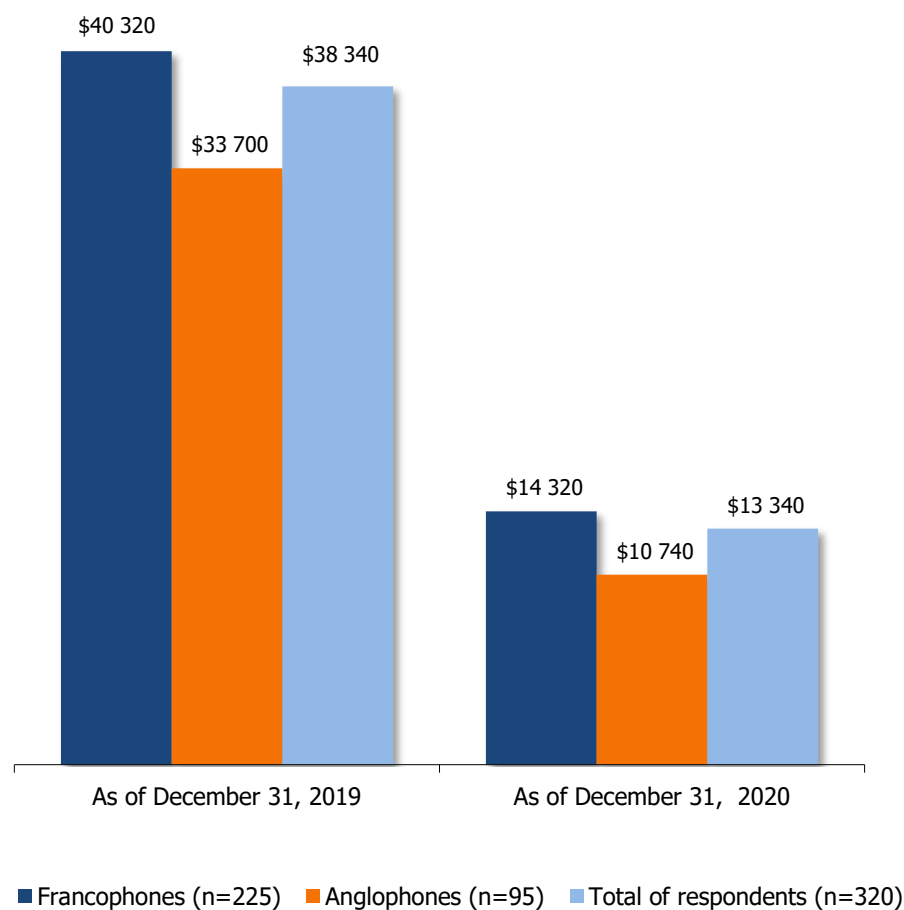


Q5 What is your annual income related to your professional circus arts activities (in CAN \$)?

As of December 31, 2019

As of December 31, 2020 (estimated)

Figure 5 - Annual Circus Revenues: Average per Respondent



	Francophones	Anglophones	All
Variation from December 31, 2019 to December 31, 2020	-64,5%	-68,1%	-65,2%

Q6 Please break down your annual income as a percentage according to the territory as of December 31, 2019. Make sure the total adds up to 100%.

In Canada (%)

Outside of Canada (%)

Figure 6 - Annual circus arts revenues: distribution between those made in Canada and those made outside of Canada

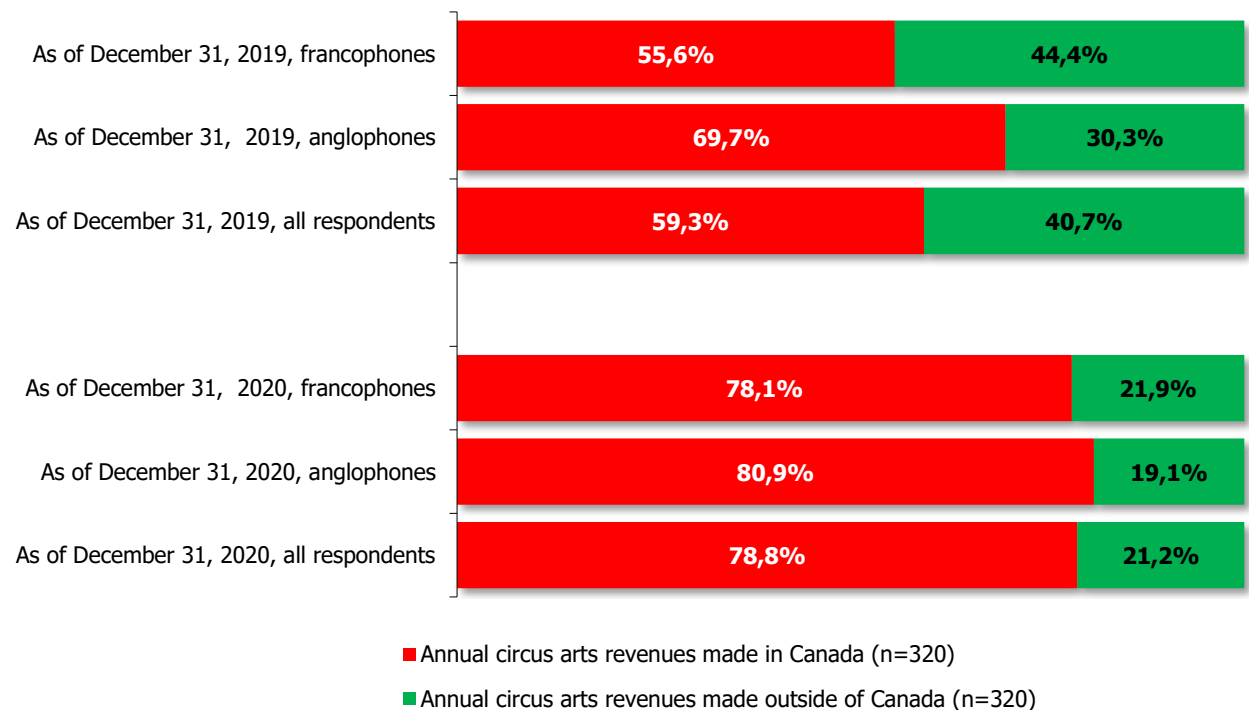


Figure 7 - Annual circus arts revenues in Canada: average per respondent

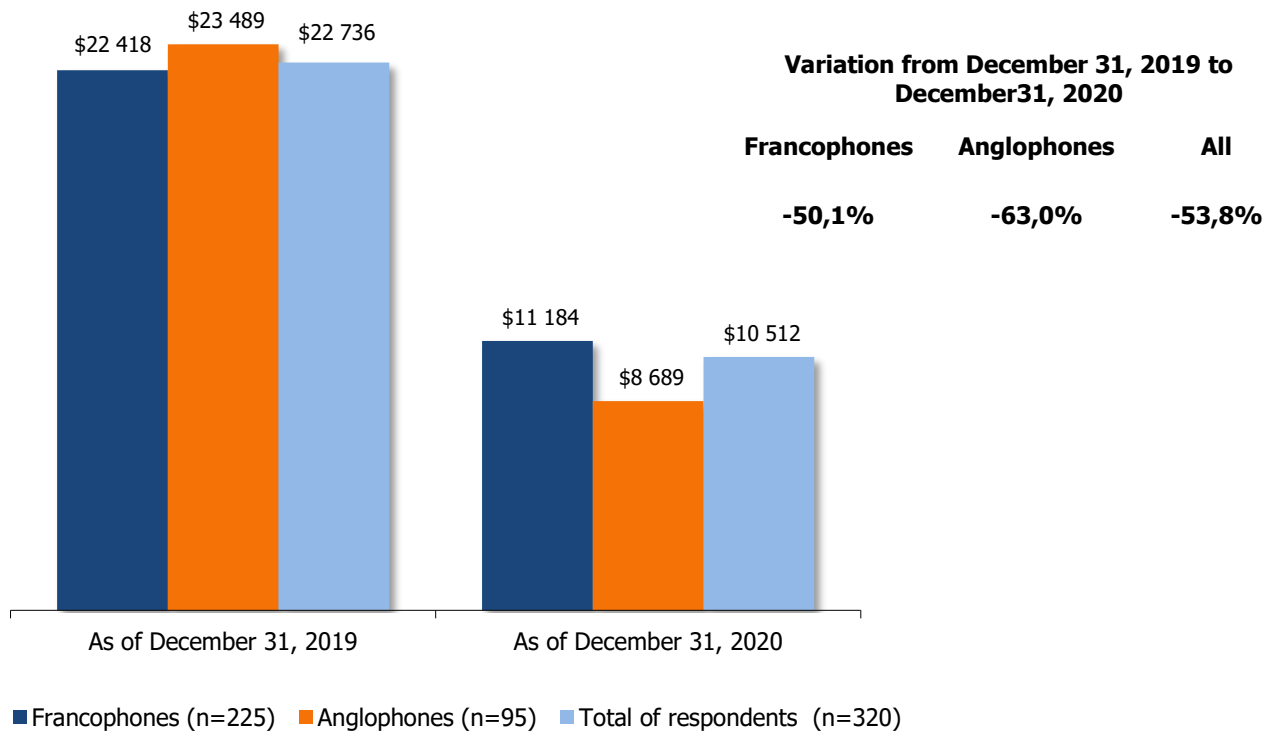


Figure 8 - Annual Circus Arts Revenues Outside of Canada: Average per Respondent

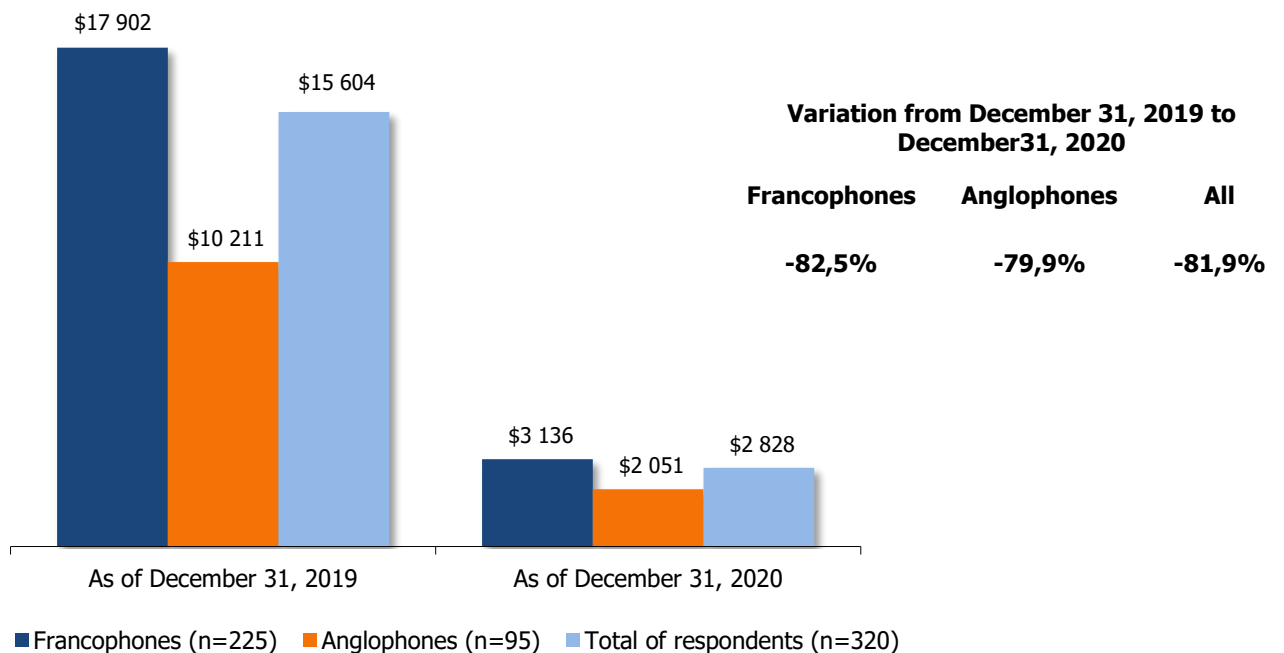
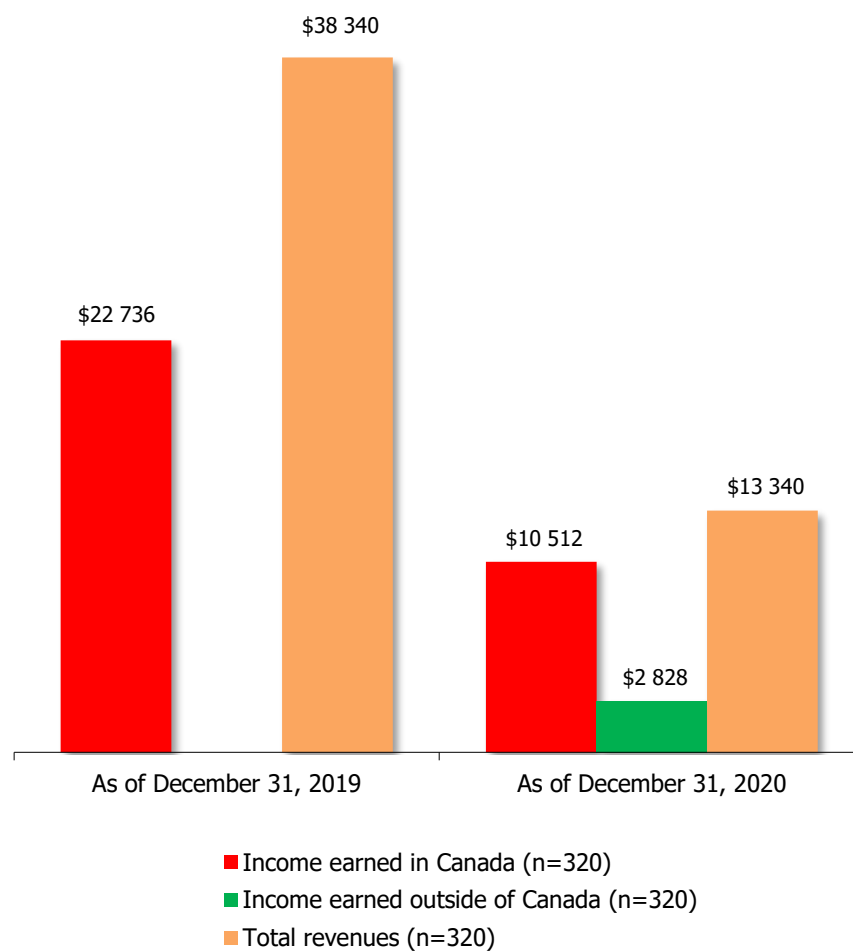


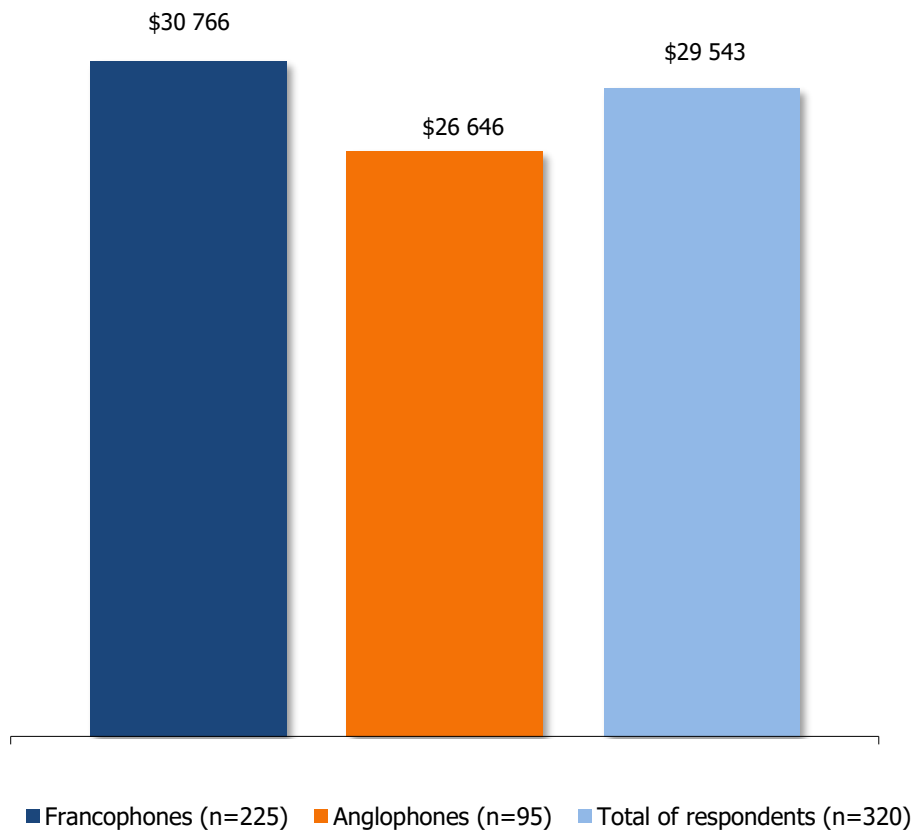
Figure 9 - Annual Circus Arts Revenues in Canada, Outside of Canada, and Totals: Average per Respondent



	Revenus effectués au Canada	Revenus effectués à l'extérieur du Canada	Revenus totaux
Variation du 31 décembre 2019 au 31 décembre 2020	-53,8%	-81,9%	-65,2%

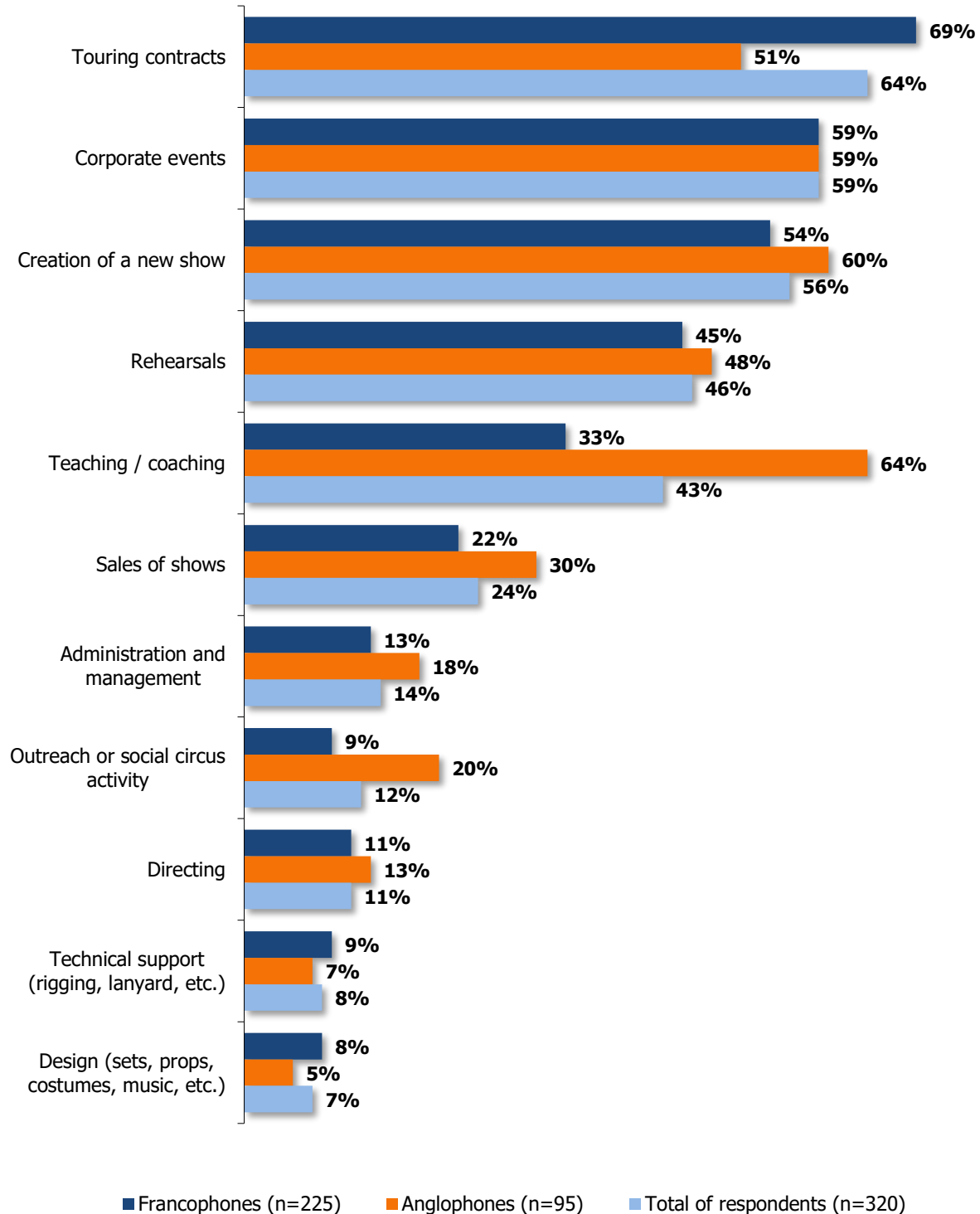
Q7 What is your estimate of lost revenue due to show cancellations or cessation of professional activities since the beginning of the COVID-19 pandemic?

Figure 10 - Loss of income due to show cancellations or cessation of professional activities since the beginning of COVID-19: Average of respondents



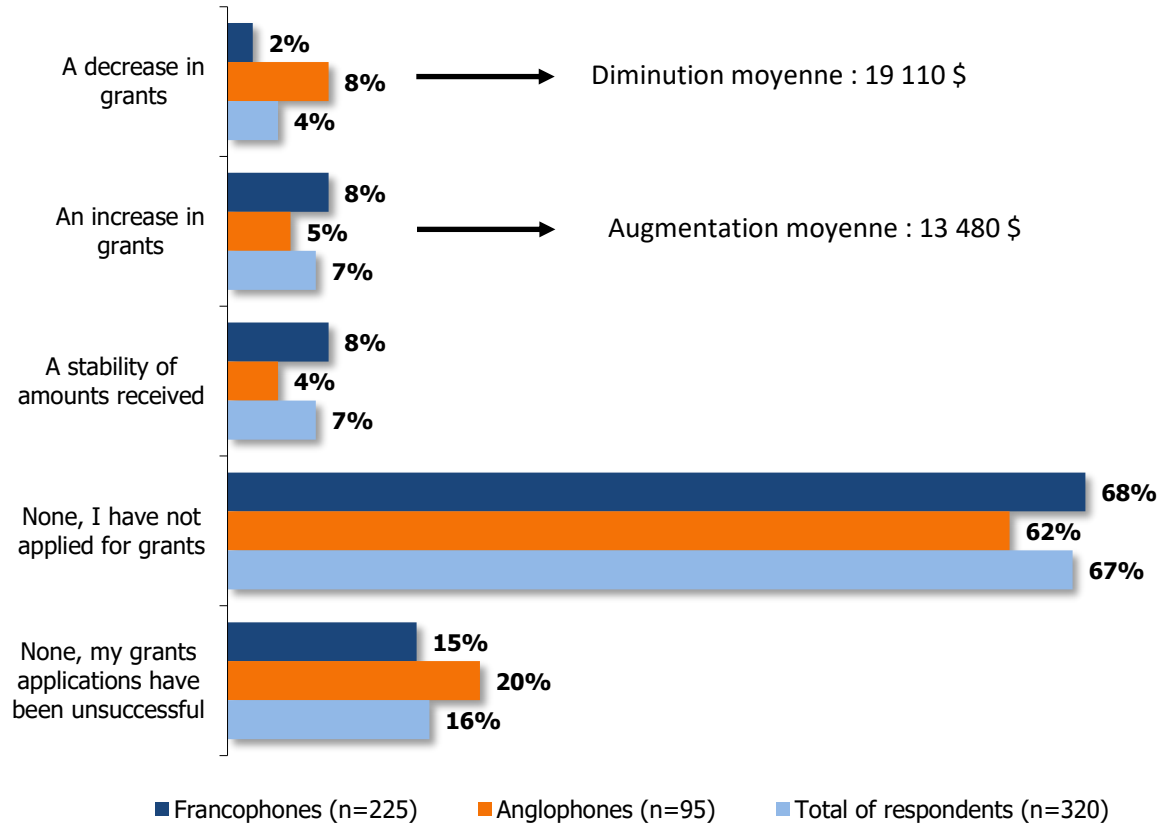
Q8 What is the nature of the contracts that you have lost? (Tick all boxes that apply)

Figure 11 - Nature of Lost Contracts



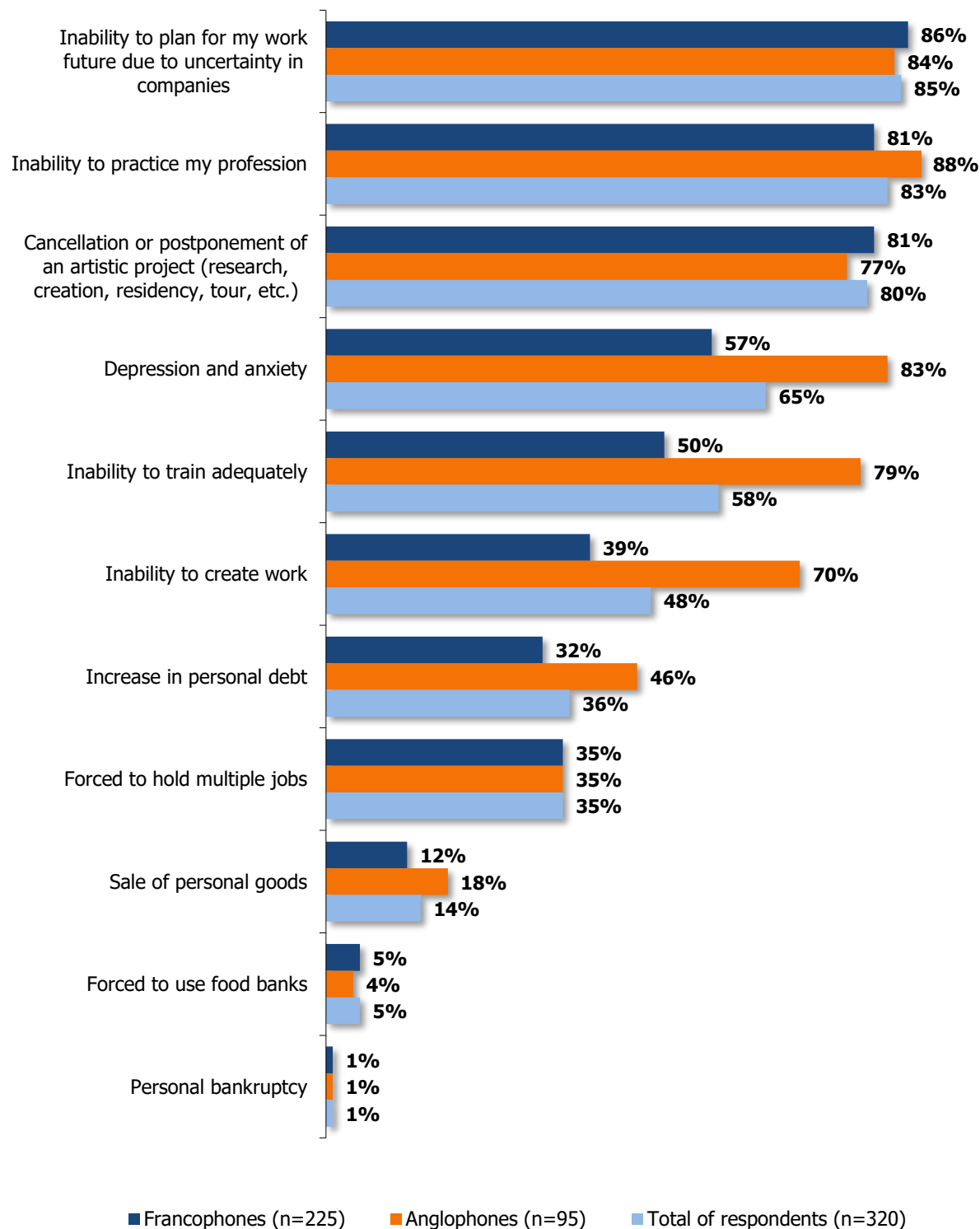
Q9 Since COVID-19, have you experienced?

Figure 12 - Status of grants since COVID-19



Q10 In addition to the loss of income, what other impacts have you experienced? (Tick all boxes that apply)

Figure 13 - Largest Impacts Besides Loss of Income



Q11 Will the financial losses incurred and estimated as of December 31, 2020, as well as the end of employment benefits, jeopardize your ability to continue your professional activities?

Figure 14 - Ability to continue working jeopardized due to financial losses incurred and estimated as of December 31, 2020, and the end of the wage benefits program

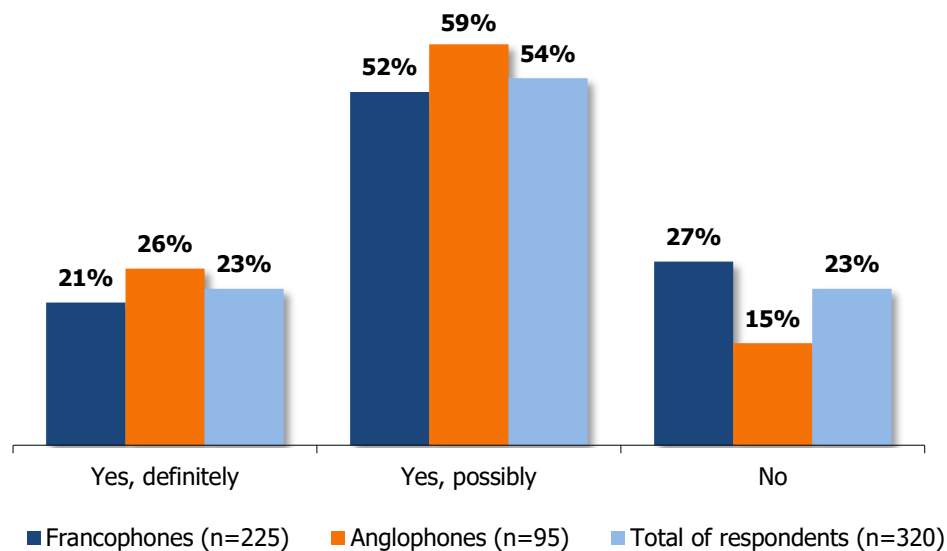
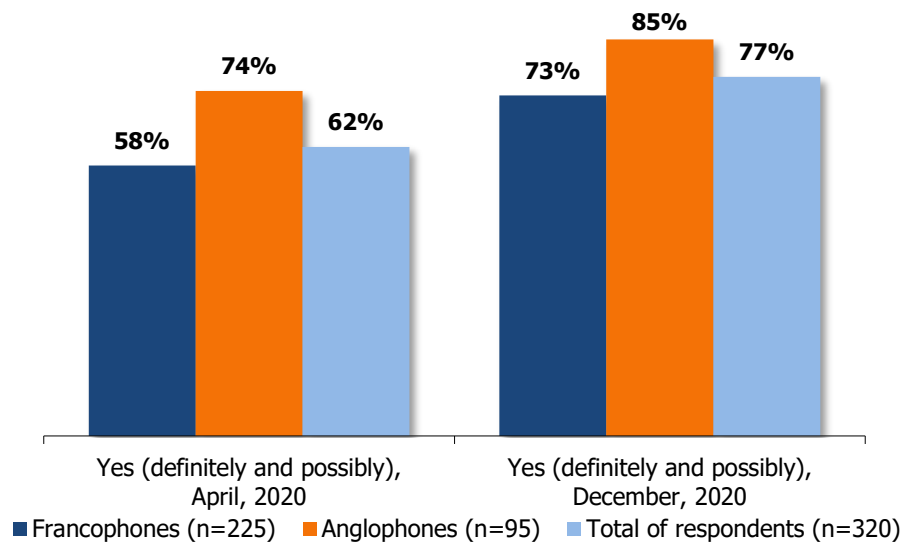
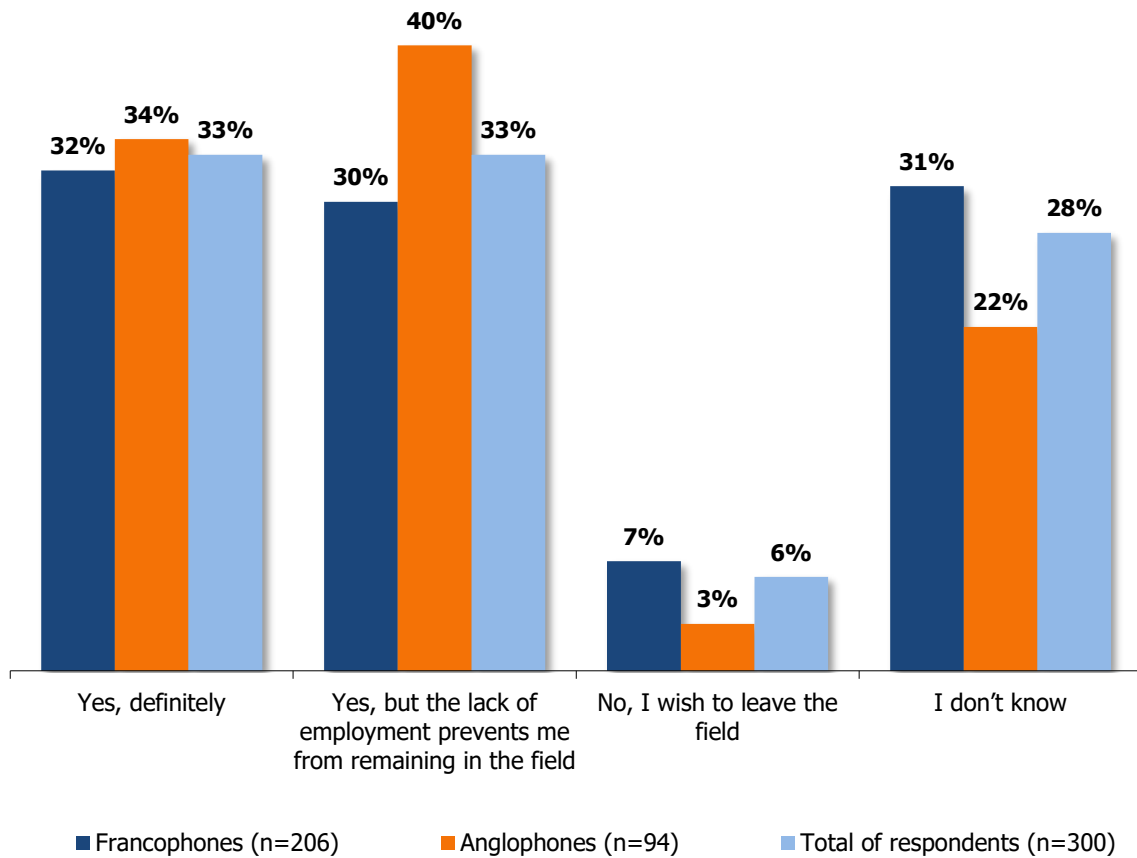


Figure 15 - Ability to continue working: change from April to December 2020



Q12 If you consider a career change, do you wish to remain in the circus arts sector?

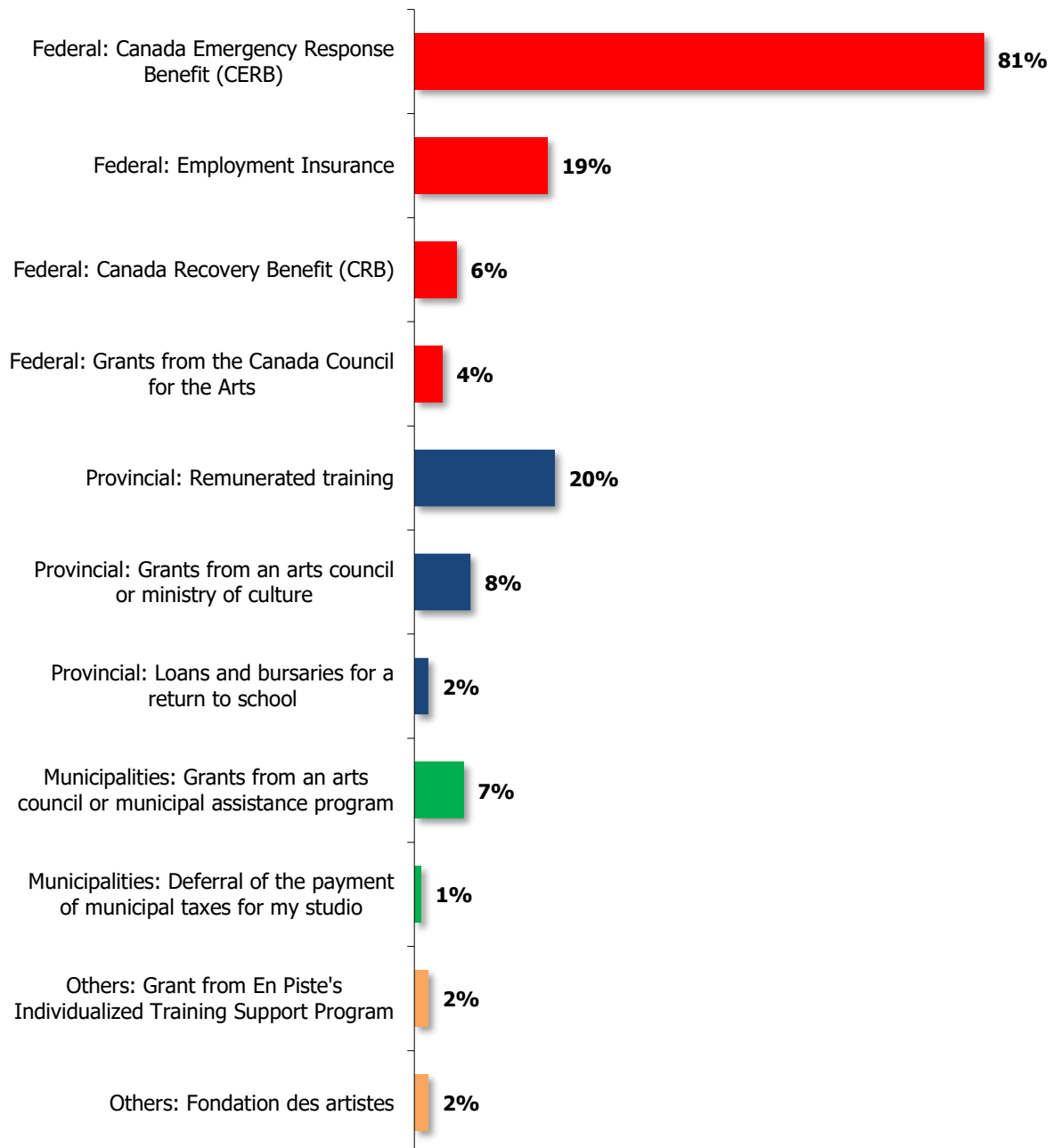
Figure 16 - Desire to remain in the circus arts sector, if career transition considered



93.8% are considering a career transition (322 out of 320)

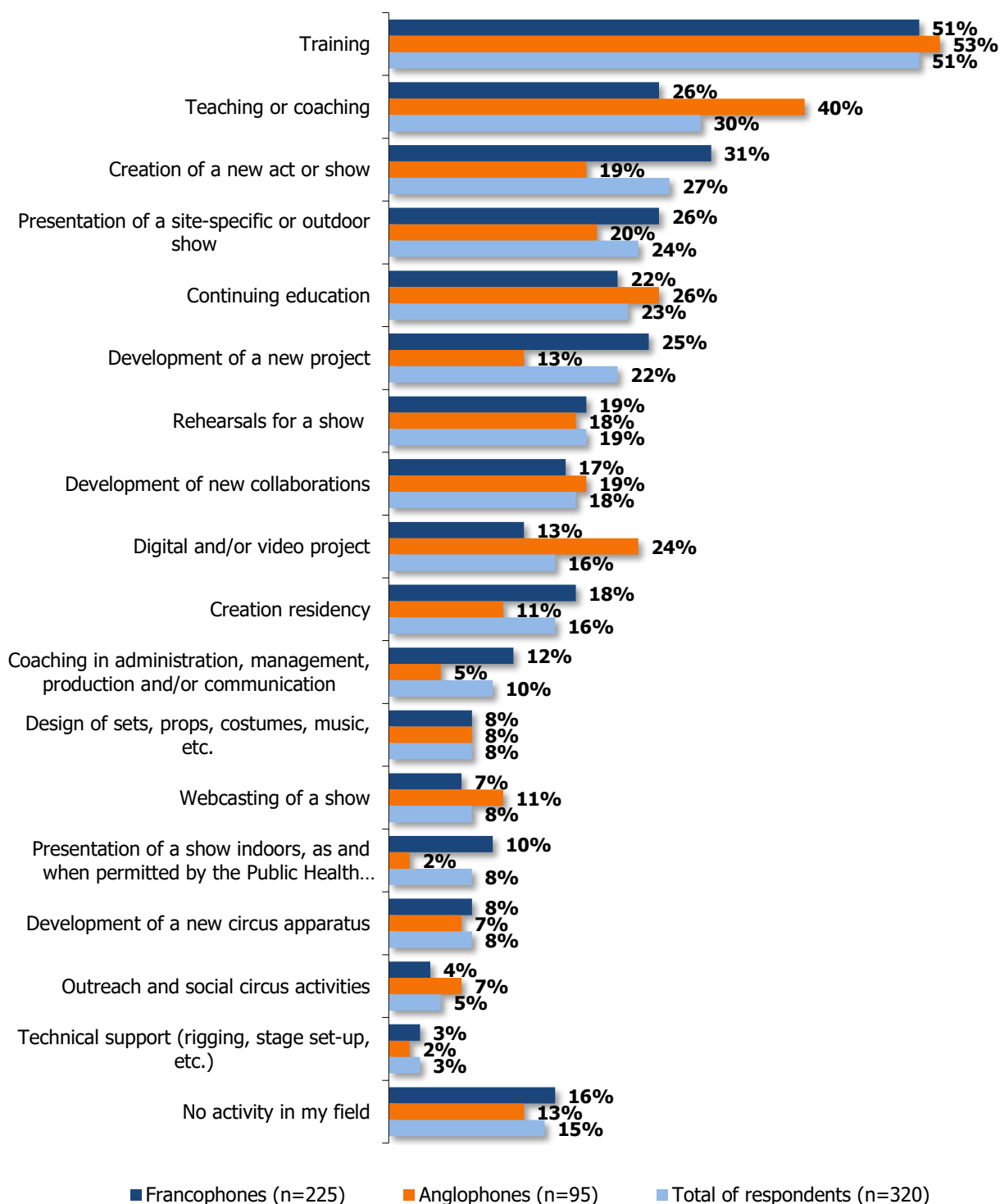
Q13 Since the beginning of the pandemic, have you received financial assistance from any of these federal government programs?

Figure 17 - Financial assistance received from government and other programs since the beginning of the pandemic



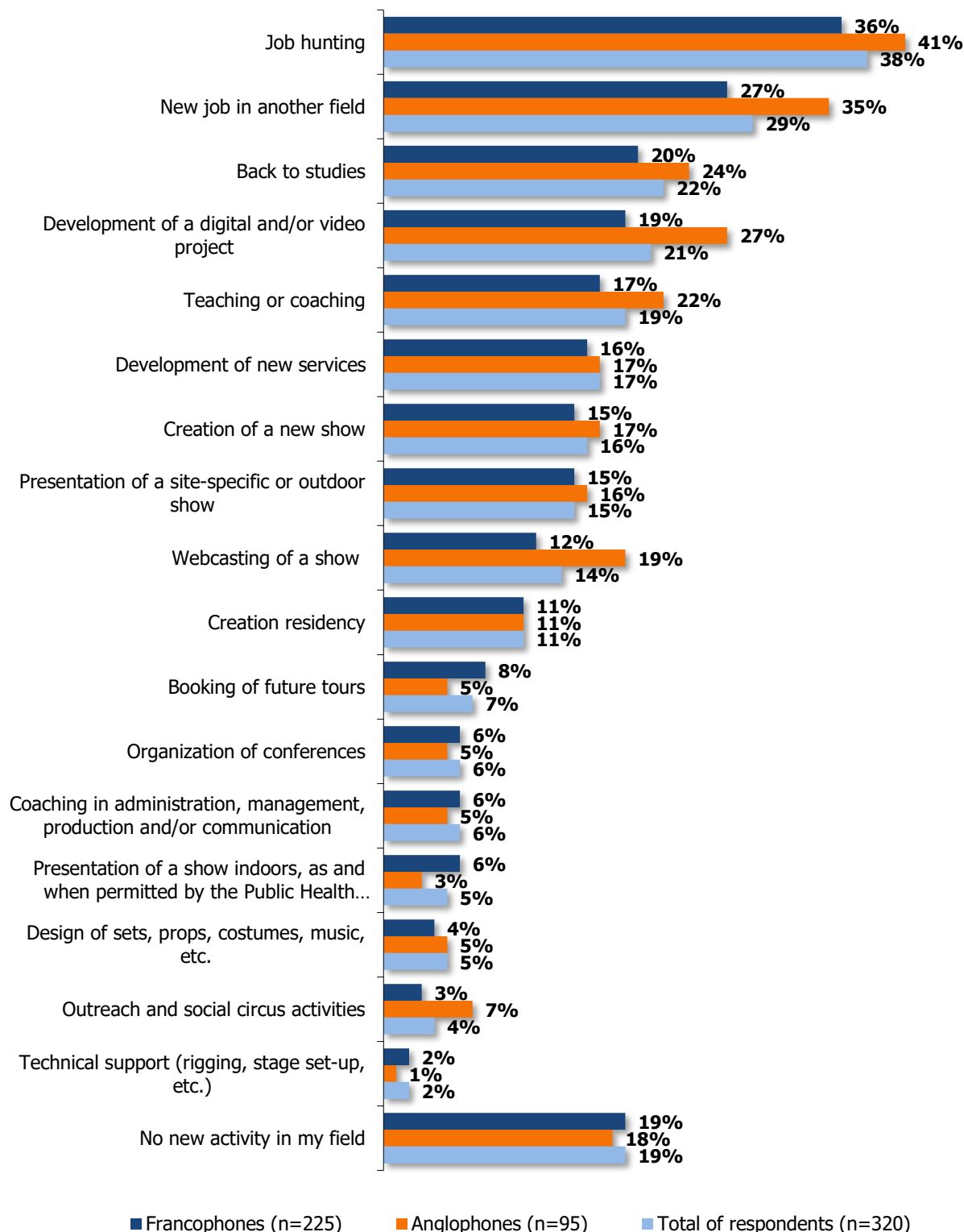
Q14 Among the professional activities you carried out before COVID-19, which ones were you able to continue, in compliance with the regulations imposed by the Public Health authorities? (Tick all boxes that apply)

Figure 18 - Occupational activities prior to COVID-19 that respondents were able to pursue



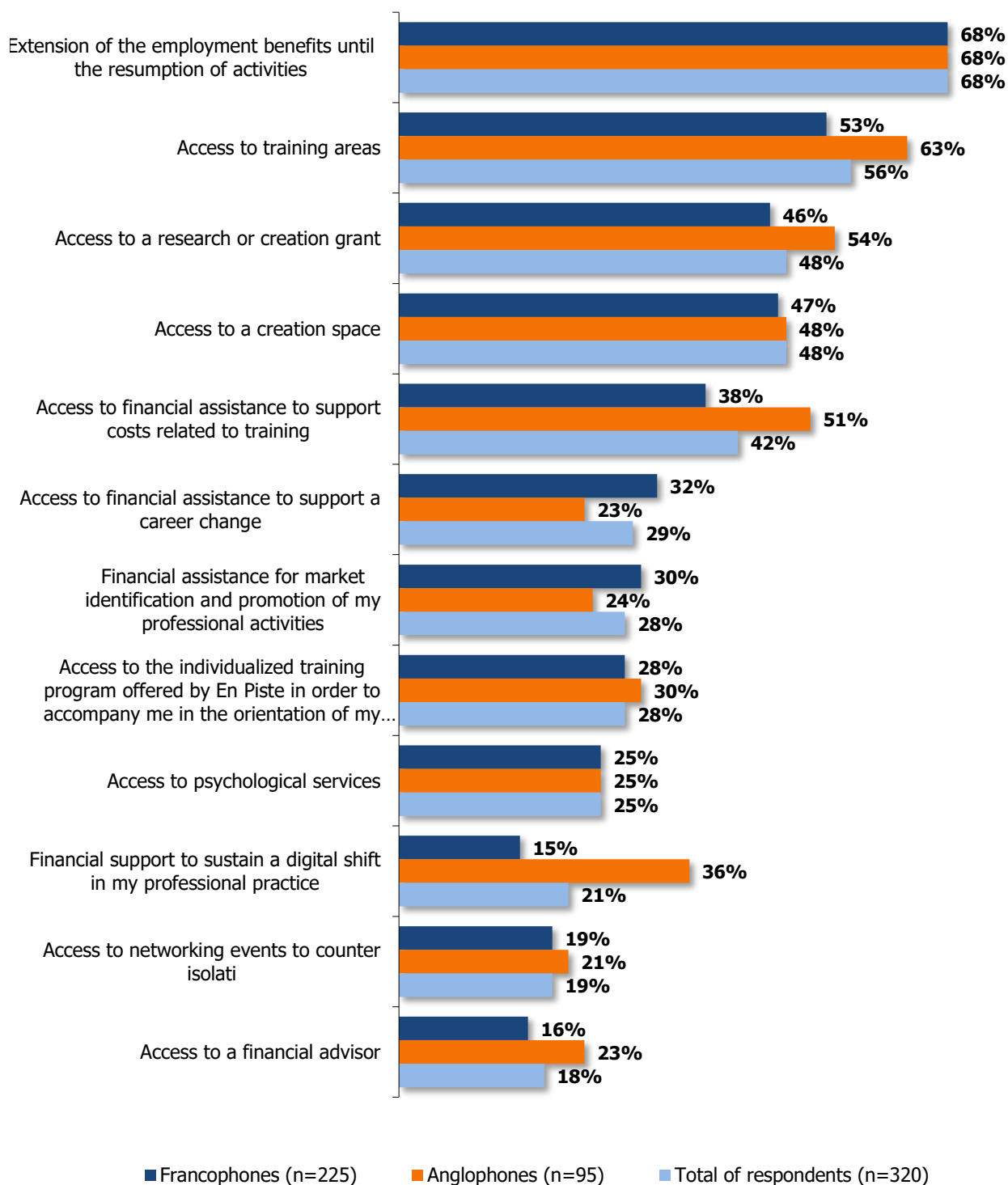
Q15 What new activities have you undertaken or had to undertake since the beginning of the pandemic? (Tick all boxes that apply)

Figure 19 - New work activities that respondents have undertaken or had to undertake since COVID-19



Q16 In addition to the current measures put in place by governments, what will you need to ensure the recovery of your professional activities? Please tick the five most important points.

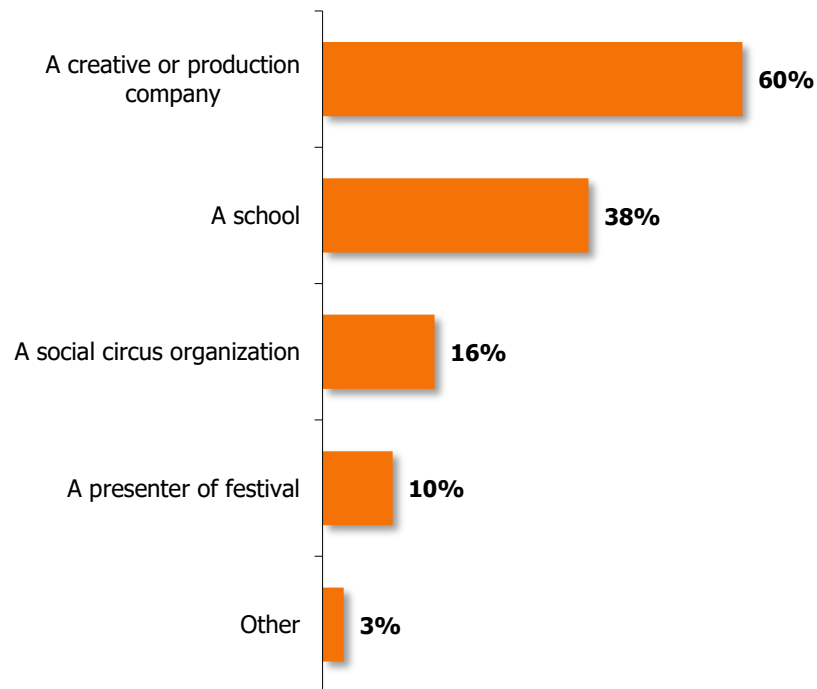
Figure 20 - Needs for recovery in addition to the current measures put in place by governments



Appendix 2: Survey of organizations

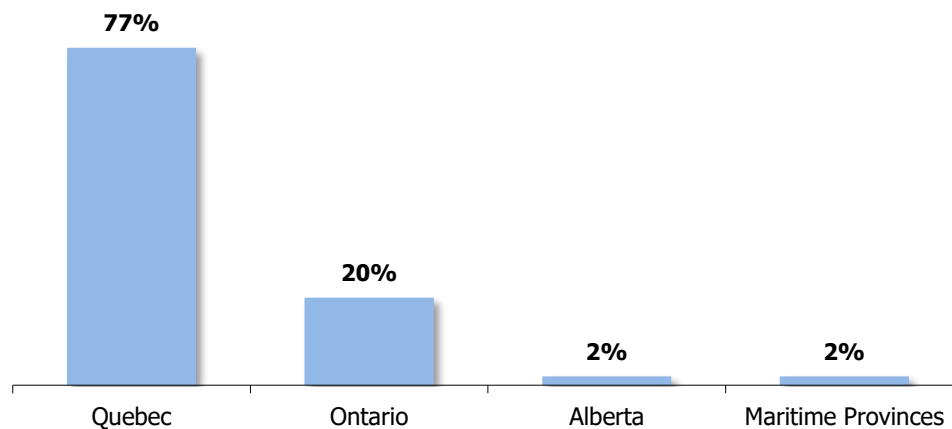
Q1 You are:

Figure 1 - Type of organization (n=61)



Q2 Your organization is located in:

Figure 2 - Location (province) of organization (n=61)



Q3 Indicate your organization's annual turnover (total revenues), including revenue outside of Canada:

Q4 Please break down your annual turnover as a percentage according to the territory for the fiscal year ended 2019.

For the fiscal year ended 2019

For the current fiscal year (estimated)

Figure 3 – Revenues in Canada, outside of Canada, and total: Average per Respondent

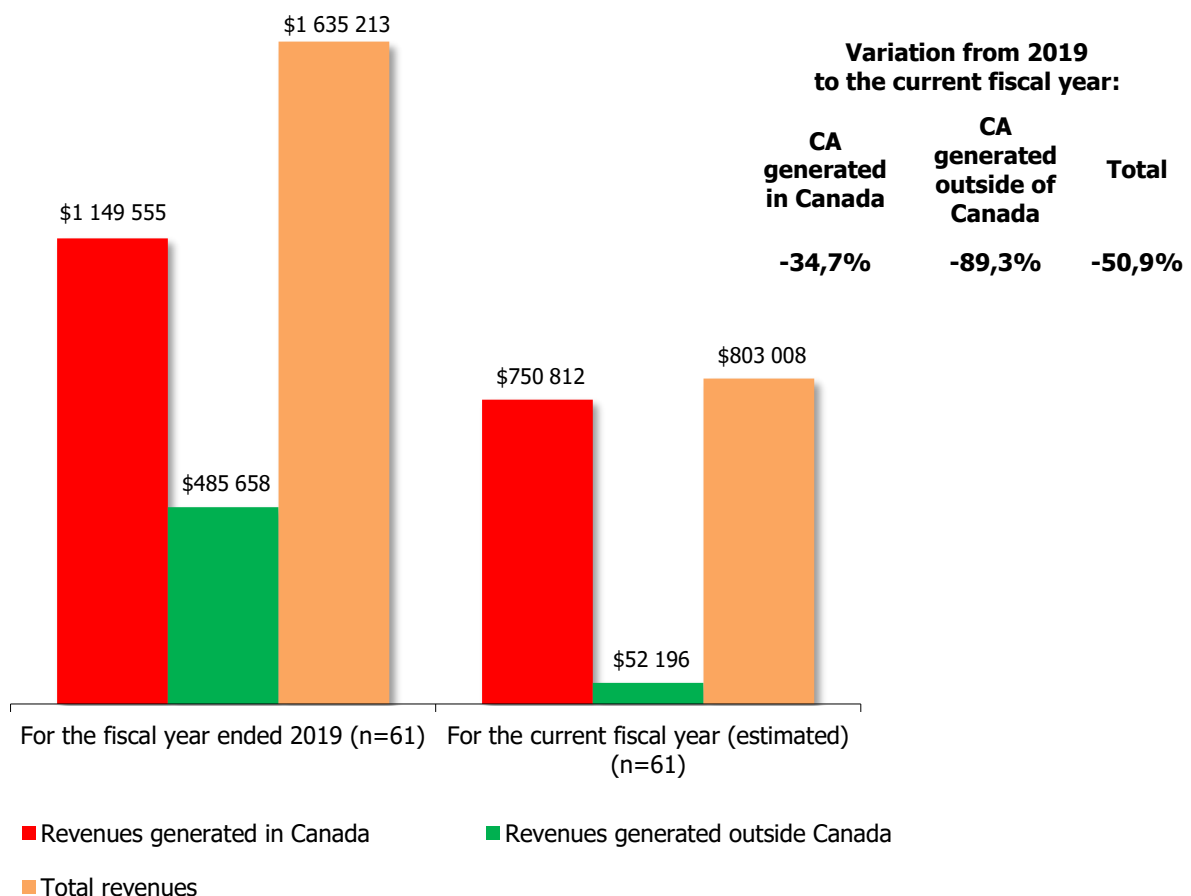
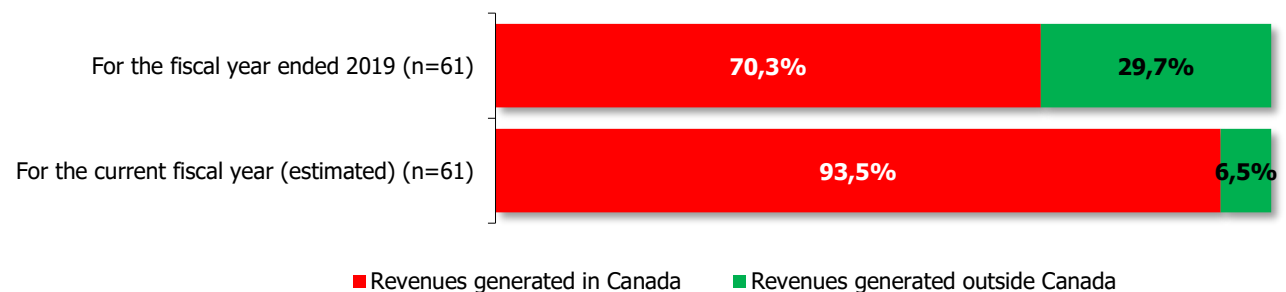


Figure 4 - Revenues: Distribution between revenues in Canada and revenues outside of Canada



Q5 Please break down your annual turnover as a percentage according to the nature of your income for the fiscal year ended 2019.

For the fiscal year ended 2019

For the current fiscal year (estimated)

Figure 5 - Revenues: Breakdown by Type of Revenue

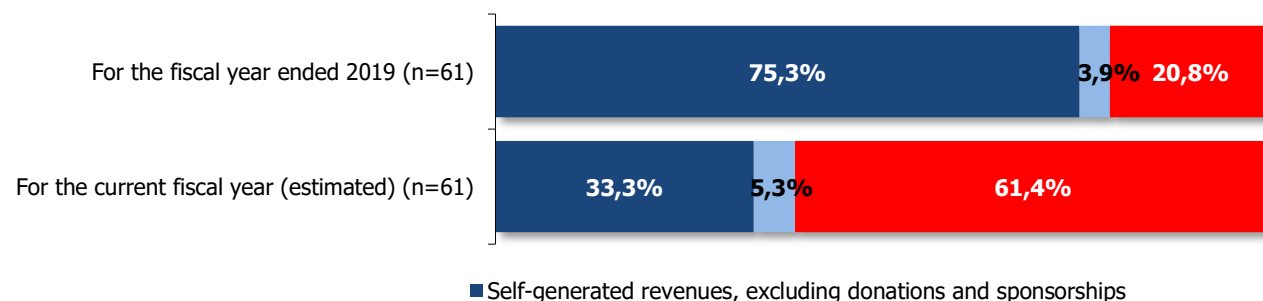


Figure 6 - Revenues by Type of Income: Average per Respondent

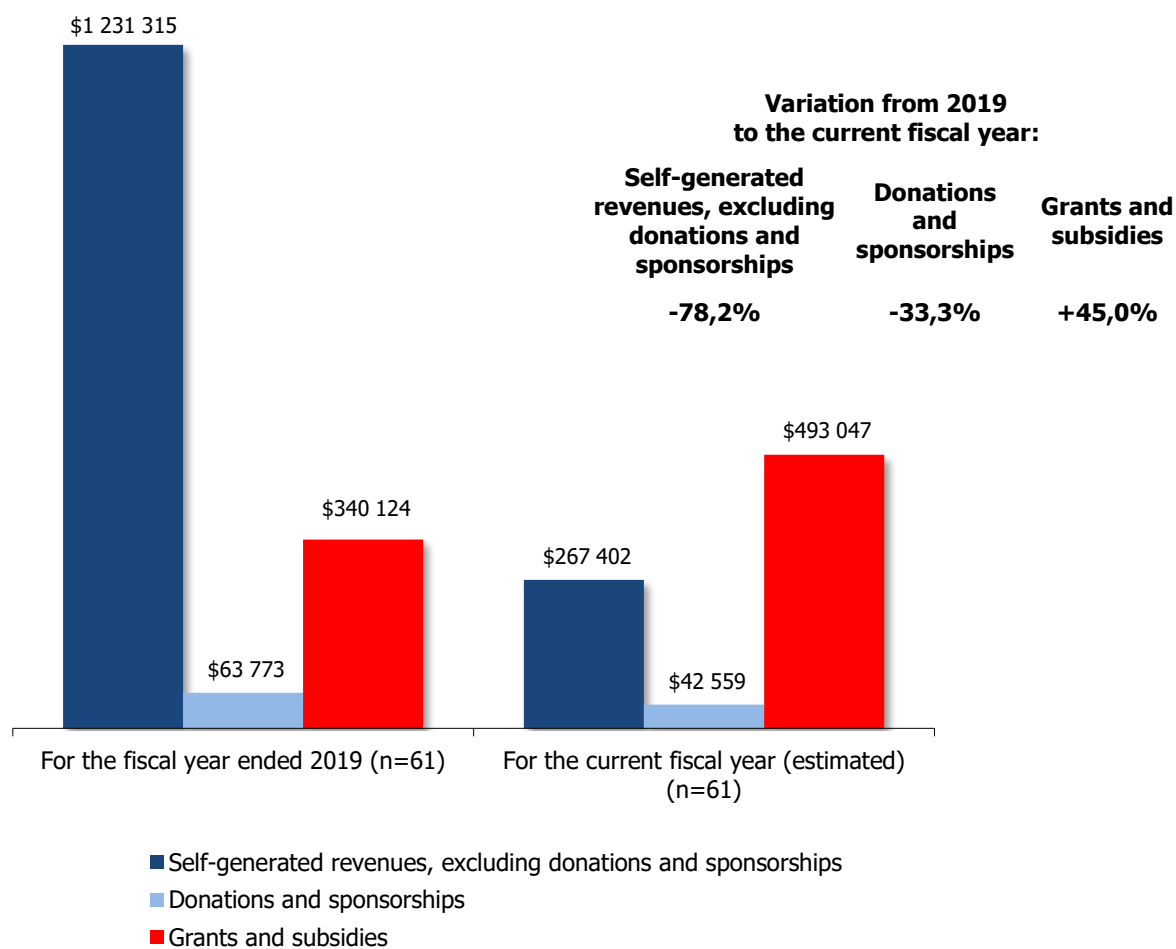
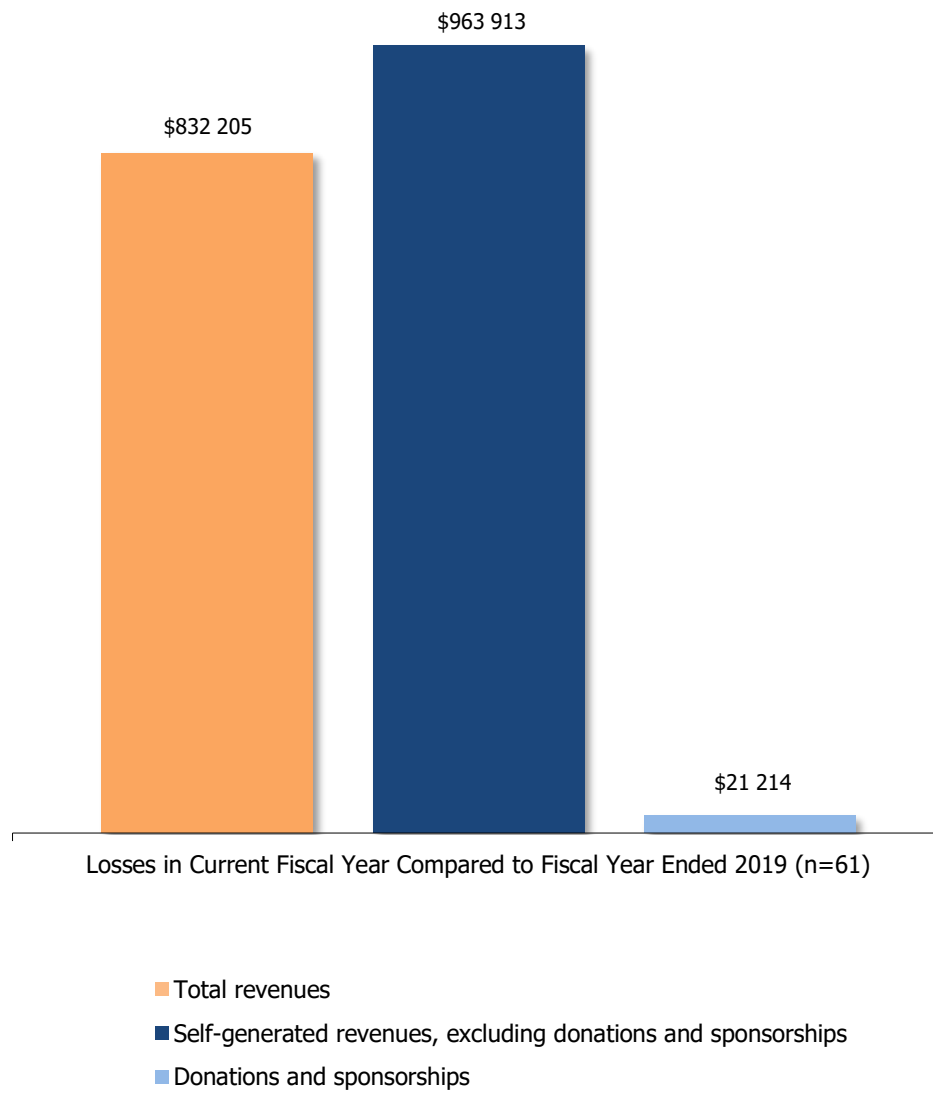
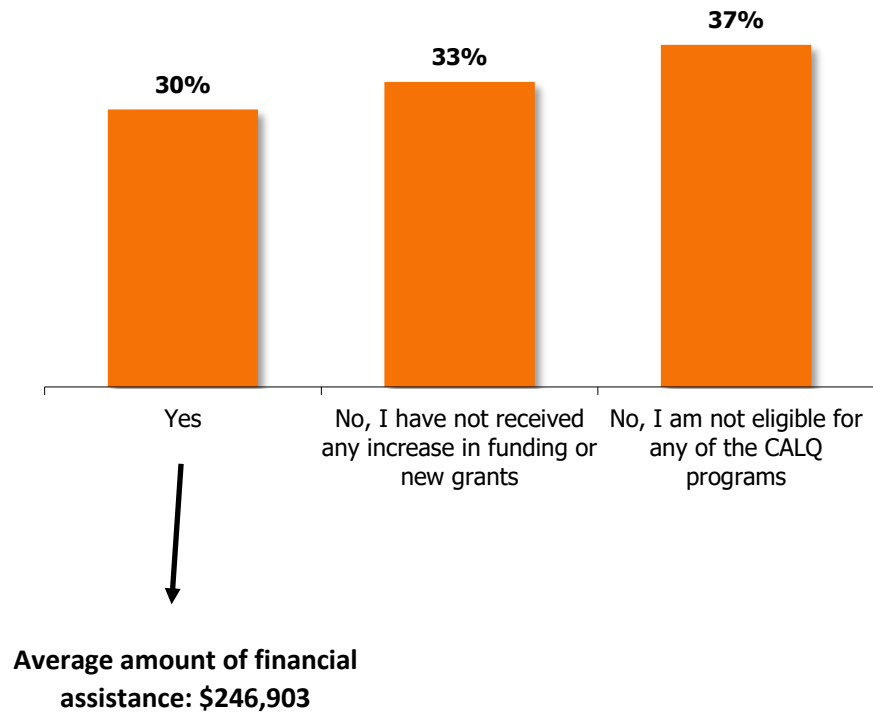


Figure 6.1 - Losses Incurred: Average per Respondent



Q6 If your head office is located in Quebec, has the \$10 million emergency financial assistance been beneficial to your organization?

Figure 7 - If the head office is in Quebec, benefiting from \$10 million in financial assistance (n=49)



**Q7 How many spectators have you reached in Canada / outside Canada / total :
For the fiscal year ended 2019
For the current fiscal year (estimated)**

Figure 8 - Number of spectators reached in Canada, outside of Canada and total: average per respondent

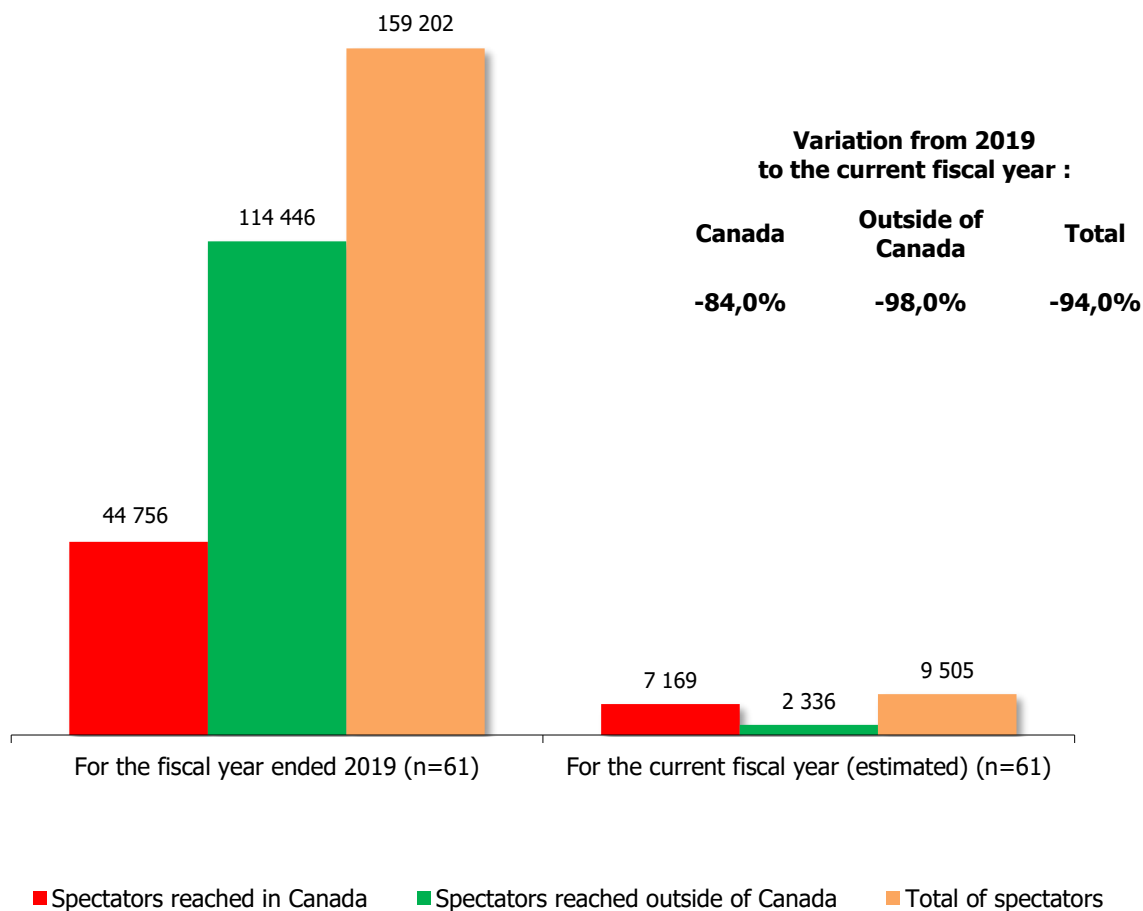
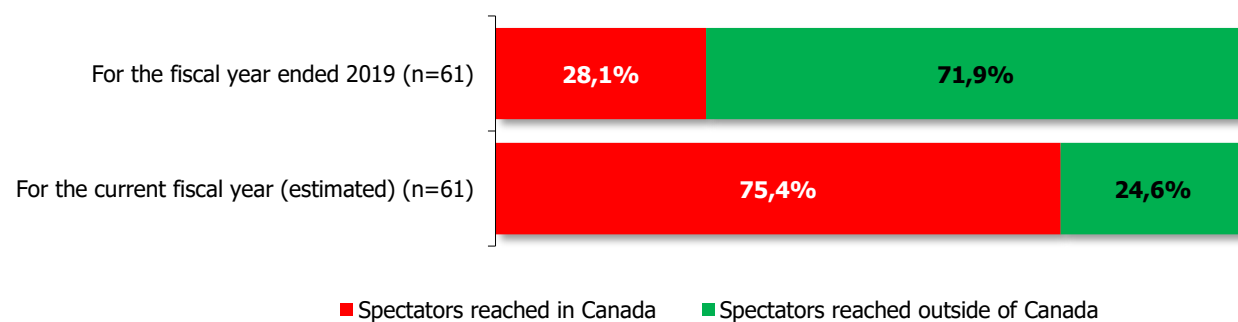


Figure 9 - Number of spectators reached: distribution between those reached in Canada and those reached outside of Canada

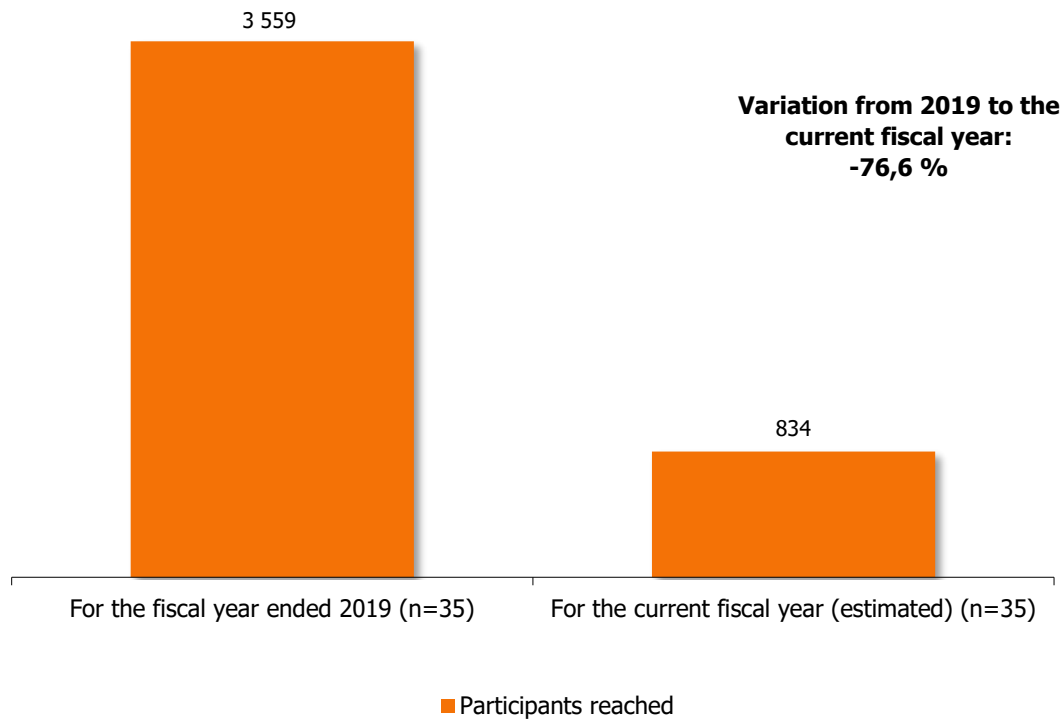


Q8 If you are an educational institution or social circus organization, how many participants have you reached through your programs or activities?

For the fiscal year ended 2019

For the current fiscal year (estimated)

Figure 10 – Number of Participants Joined in Educational Programs or Activities (Educational Institution or Social Circus Company): Average per Respondent

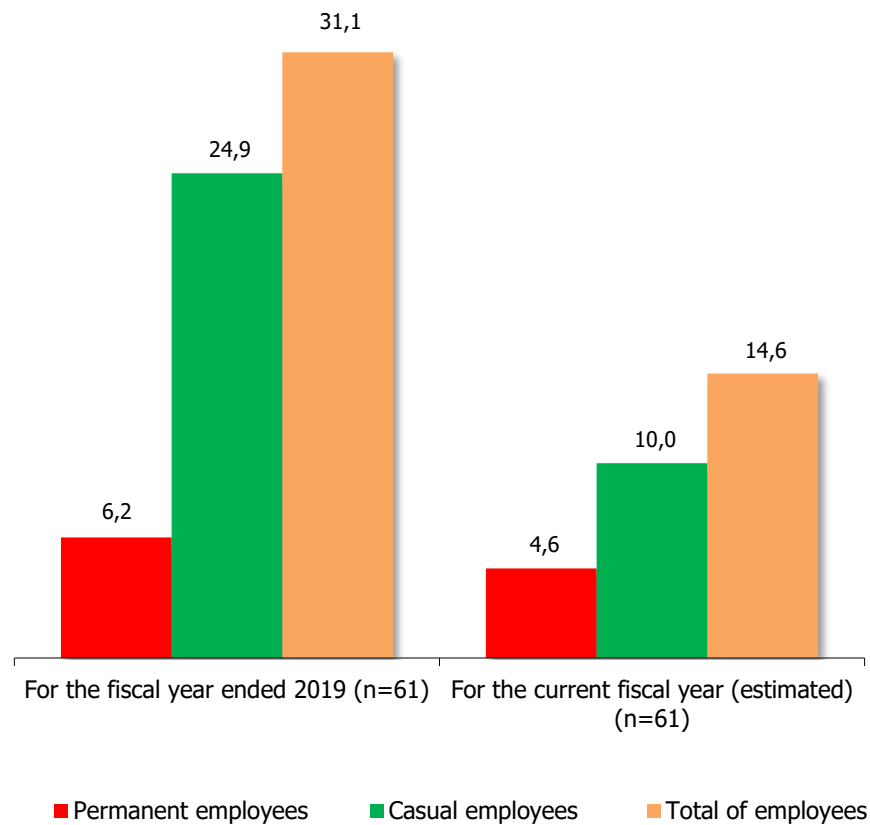


Q9 How many permanent, casual and total employees do you have in your organization during these periods?

As of December 31, 2019

As of December 31, 2020 (estimated)

Figure 11 - Number of Permanent, Casual, and Total Employees: Average per Respondent

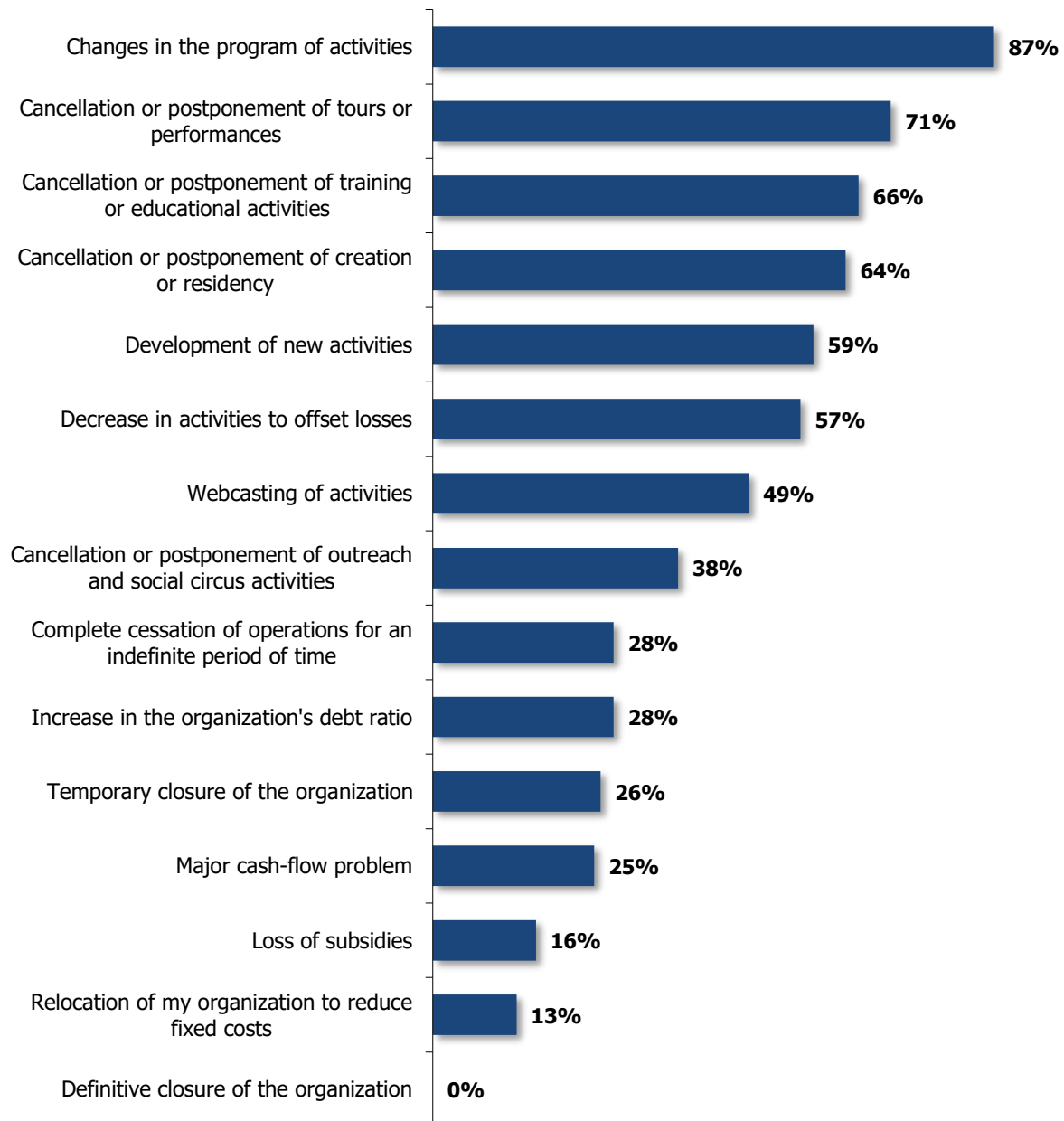


**Variation from 2019
to the current fiscal year:**

Permanent employees	Casual employees	Total
-25,8%	-59,8%	-53,1%

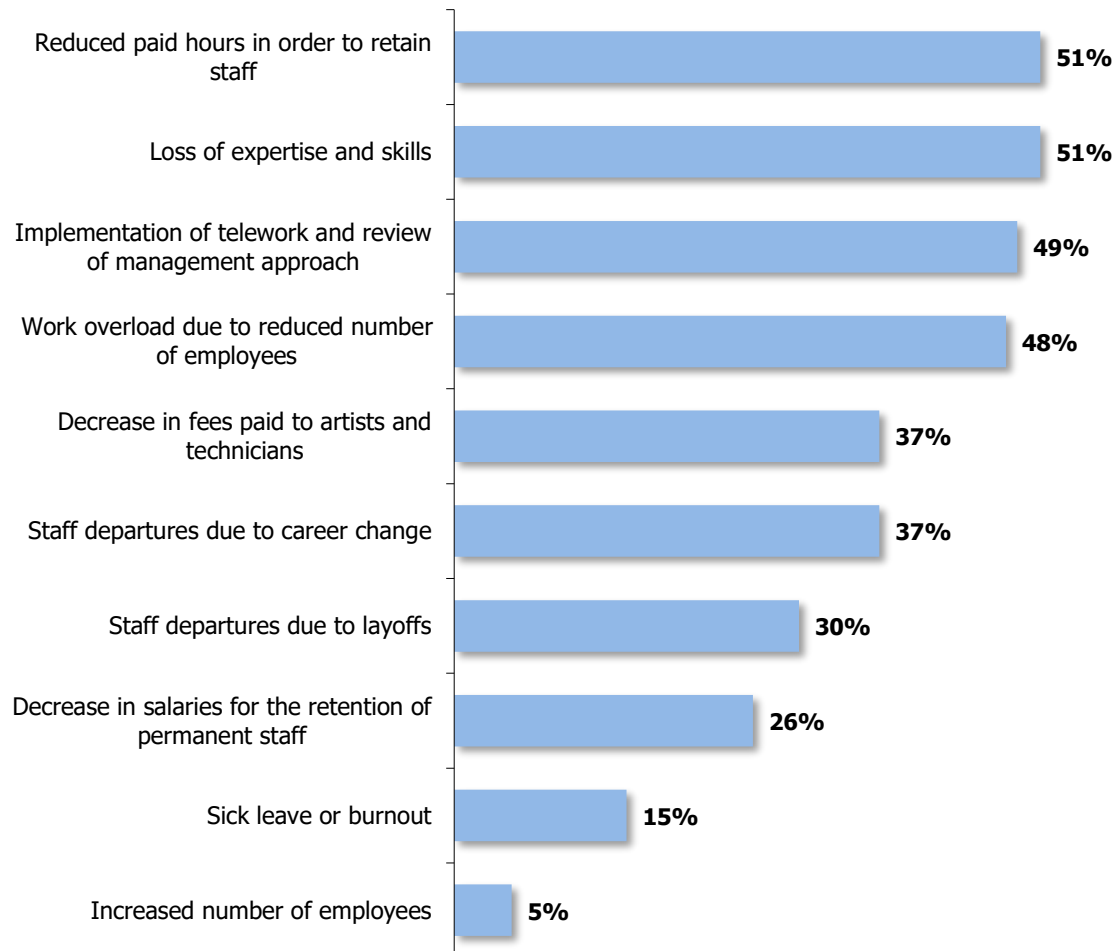
Q10 In addition to the loss of revenue and its repercussions on human resources, what are the other direct and indirect COVID-19-related impacts on your activities? (Tick all boxes that apply)

Figure 12 - Most Important Direct and Indirect Impacts on Activities Besides Loss of Income and Human Resource Impacts (n=61)



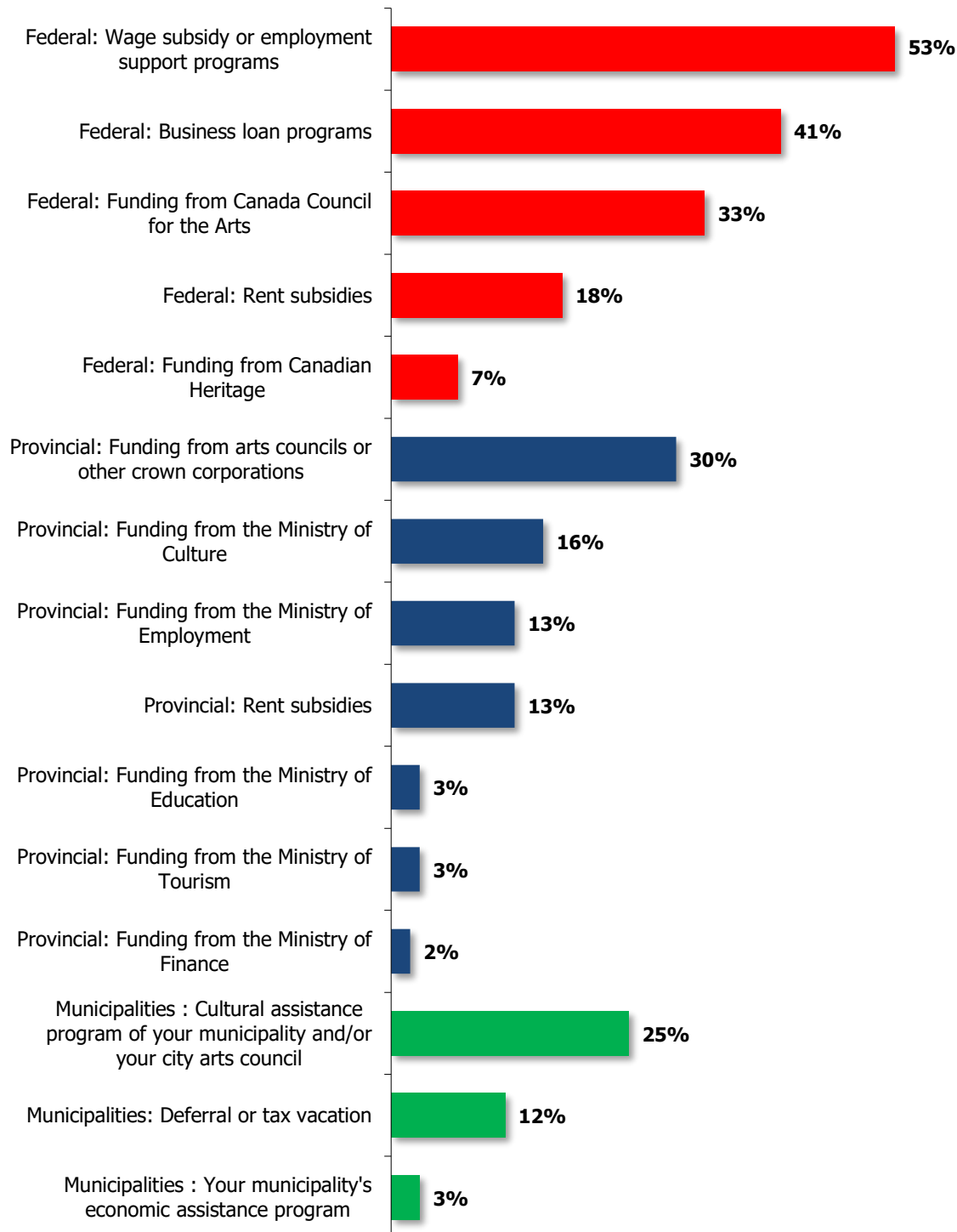
Q11 What will be the impact of the pandemic on human resources? (Tick all boxes that apply)

Figure 13 - Human Resources Impacts of the Pandemic (n=61)



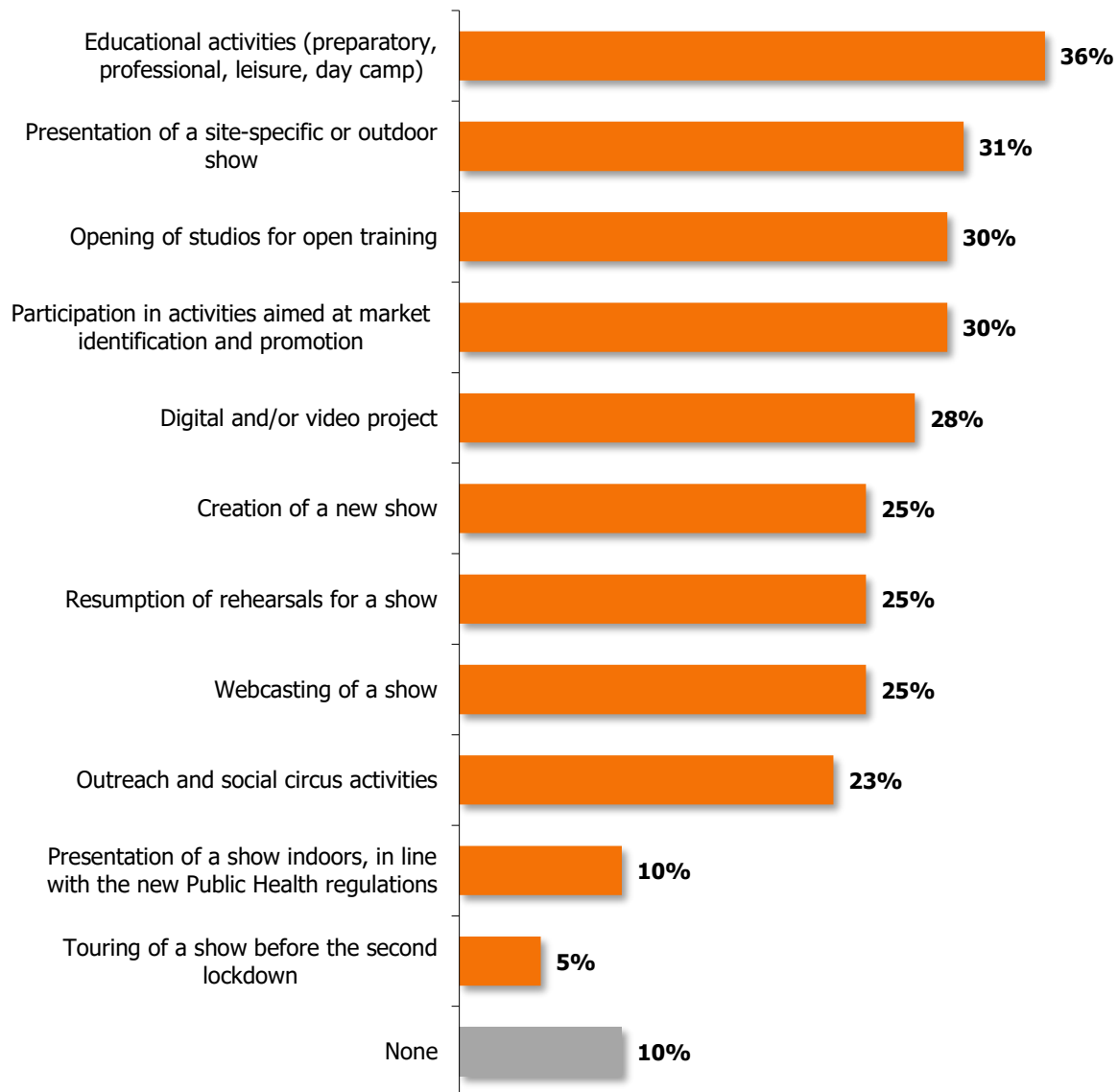
Q12 Since the beginning of the pandemic, have you received financial assistance from any of these federal government programs?

Figure 14 - Financial assistance received from government and other programs since the beginning of the pandemic (n=61)



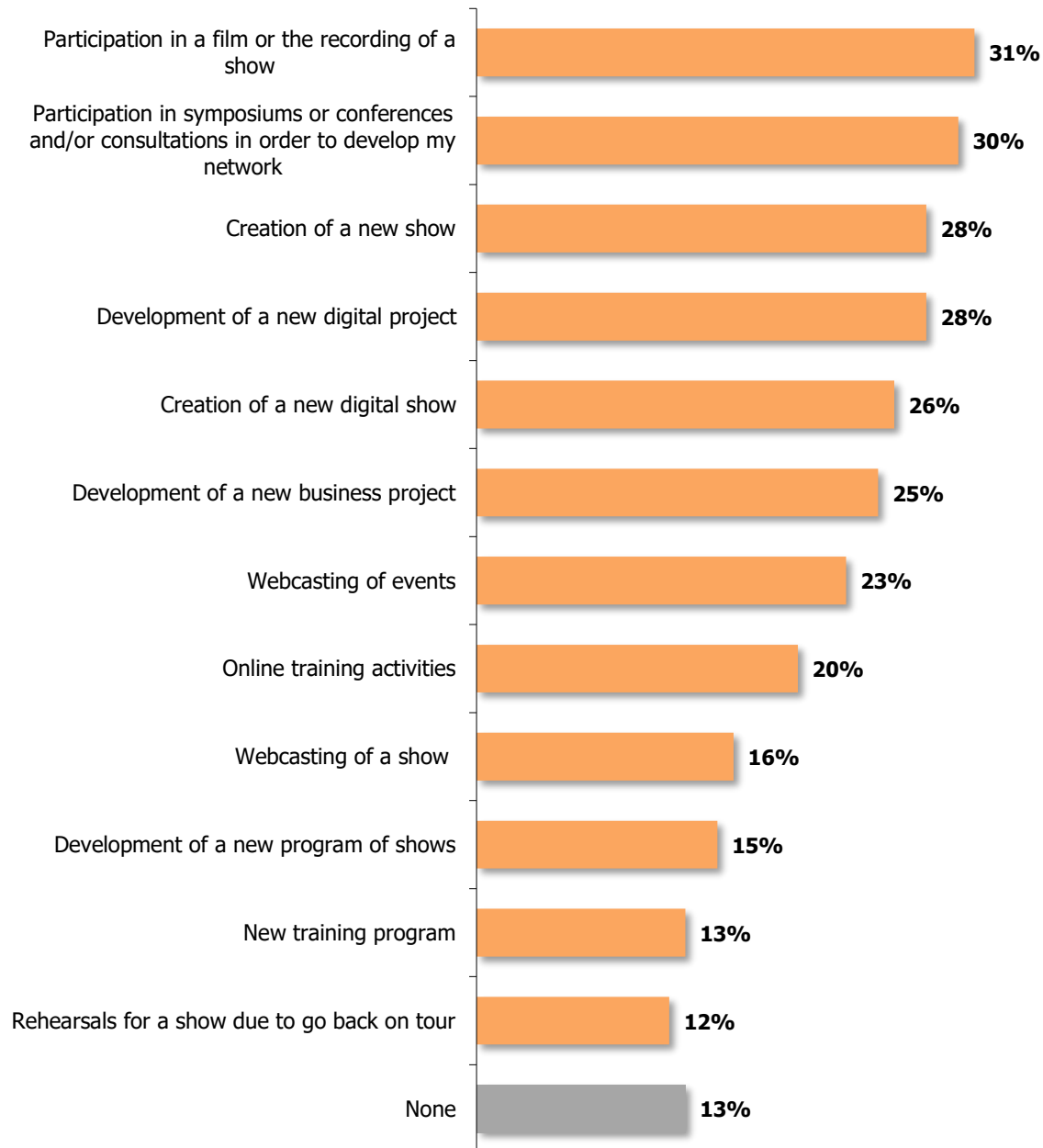
Q13 Among the activities you carried out before COVID-19, excluding new activities set up since, which ones were you able to continue, in compliance with the regulations imposed by the Public Health authorities? (Tick all boxes that apply)

Figure 15 - Pre-COVID-19 activities that organizations were able to continue (n=61)



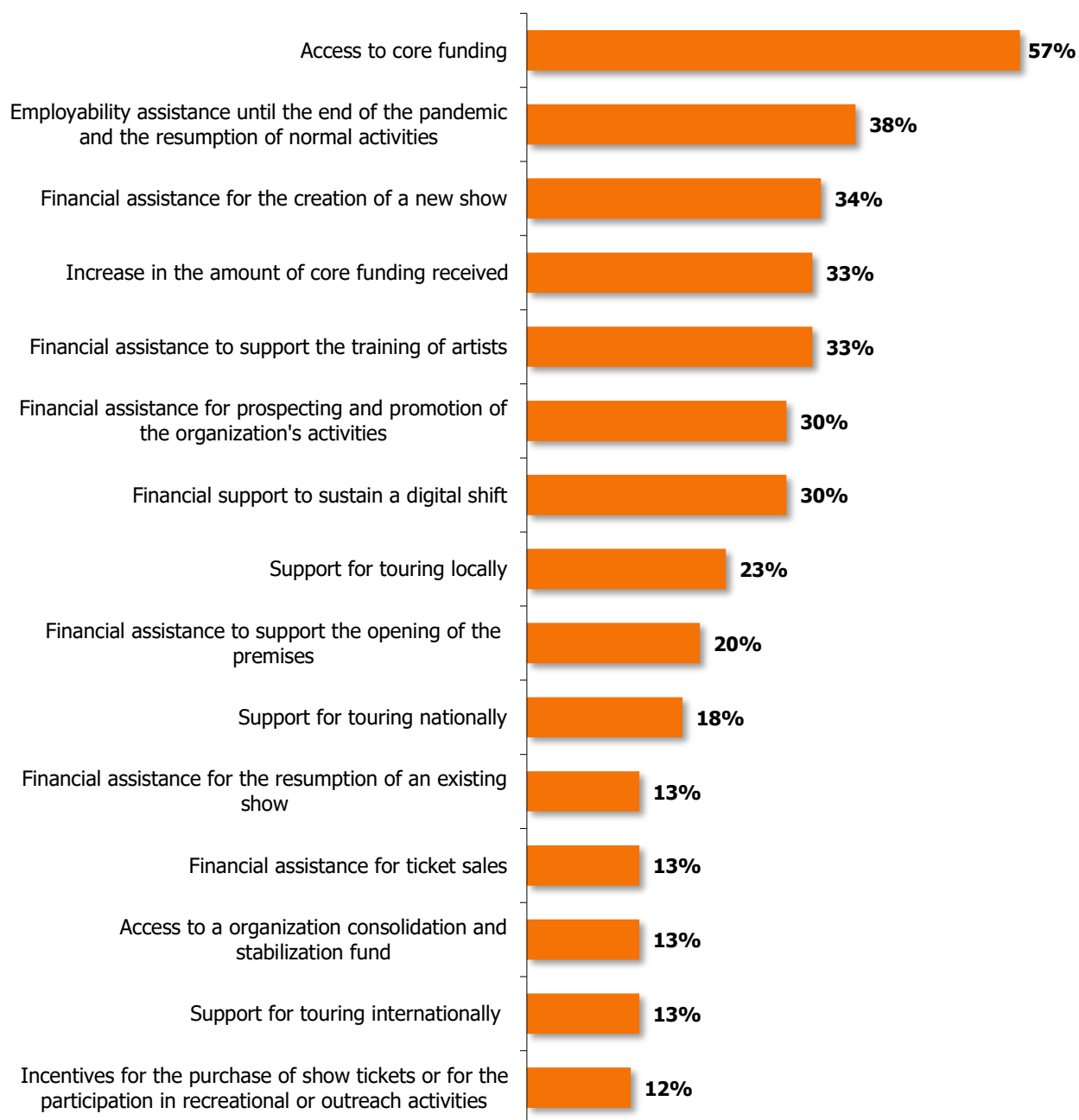
Q14 What new activities have you put in place to ensure the survival of your organization or the continuation of your activities during the pandemic? (Tick all boxes that apply)

Figure 16 - New activities put in place to ensure organizational survival or business continuity during the pandemic (n=61)



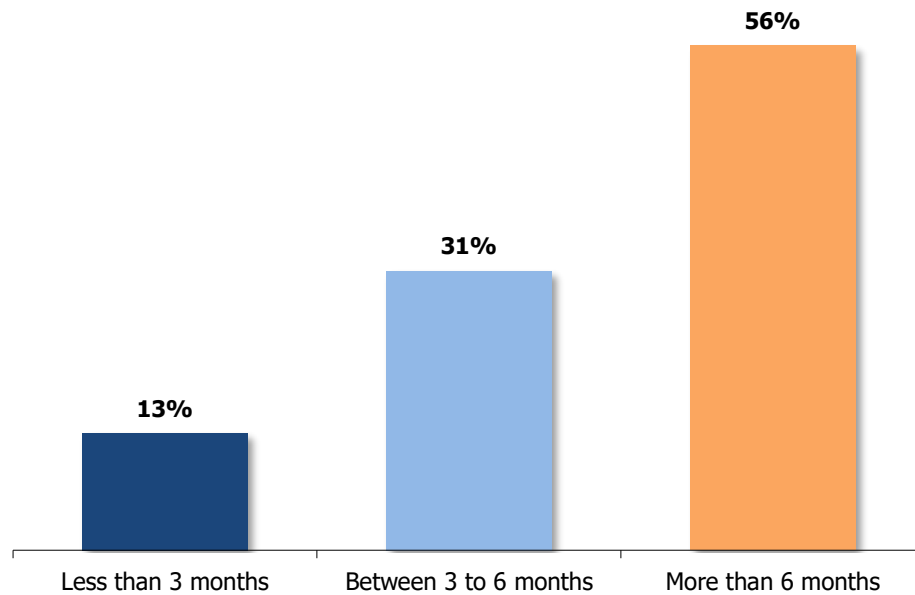
Q15 In the current context of COVID-19, what are your main financial needs for which assistance programs would ensure the survival of you organization and the recovery of your operations? Please tick the five most important points.

Figure 17 - Main needs for recovery in addition to current measures put in place by governments (n=61)



Q16 Without any additional financial assistance, how long can you maintain your operations?

Figure 18 - Time to Maintain Agency Operations with No Additional Funding (n=61)



Q17 If you receive no additional financial assistance after March 31, 2021, what situation would apply to your organization?

Figure 19 - Organizational status if no additional funding is allocated after March 31, 2021 (n=61)

