

American Circus Educators/American Youth Circus Organization

Circus Census 2020

Final Report

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Circus Census team

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Background, methodology, and respondents

In 2020, AYCO/ACE set out to conduct a census of U.S. circus educators for the third time in its history. The purpose of the Census is to gather information on the sector and its scale, in order to advocate on behalf of circus educators. Whereas the prior Circus Censuses, in 2011 and 2018, were aimed at circus organizations more broadly, starting in 2020, the Census targets circus educators. AYCO/ACE's eventual goal is a full count of circus education programs/schools in the United States, and we aim to conduct a new Census every two years to keep tabs on the shifting landscape of the circus education sector in the U.S.

The Circus Census 2020 was scheduled to launch in spring 2020; like many plans for the year, adjustments were needed in light of the COVID-19 pandemic and the sweeping changes it brought to the U.S. starting in mid-March. In order to adapt the Census to the circumstances, we added a special section to assess the impacts of COVID-19, and revised the remainder of the survey to ask about 2019 operations as a baseline (rather than operations "in the past year").

The Circus Census was fielded as an online survey using Survey Monkey from May 29 to July 27, 2020. (See Appendix B for a copy of the survey instrument.) The survey was primarily deployed by email, including emails to the AYCO/ACE mailing lists, and a refreshed contact list from the 2018 survey. To supplement email and reach a broader audience, the survey invitation was also posted to social media.

Anyone who identified as a circus educator and had a circus school, program, or independent consultancy was eligible to respond to the Census. (See the respondent FAQ in Appendix C for a full description of eligibility criteria as described to respondents.) This report often uses "schools" as shorthand to describe respondents, but in reality, respondents may be answering on behalf of a program or organization rather than a school.

After removing duplicate responses and assessing completeness, we received responses from 140 organizations. The response rate, based on the number of individuals who were emailed the survey directly, was approximately 24%. (The actual response rate may differ because multiple people from the same school may have received an email, and those who learned of the survey another way (e.g. via social media, word of mouth, or an AYCO newsletter) are not accounted for in the calculation.)

Respondents are based in 36 states and the District of Columbia. States with at least 6 schools responding included California, Texas, Illinois, Florida, North Carolina, New York, and Massachusetts. (For detailed data tables of all questions, please see Appendix A.) Over half of responding schools were founded in the past 10 years, with a third (33%) having been founded since 2015. Schools with decades of longevity are also represented: 11% of respondents' schools were founded in the 1980s or prior. The median founding date was 2011, and the mean was 2007.

The specific individuals responding on behalf of their schools were often in leadership positions: over half identified themselves as Owner (54%), and 36% as Director or Executive Director. (Respondents wrote in their titles and could indicate multiple roles.)

Business information

About half of schools (51%) are legally structured as LLCs; non-profit structure was next most common (26% of schools). While most are not non-profits, schools indicated informally what their missions were. They expressed a variety of purposes, reflecting the diversity of the sector and the powerful potential of circus education. These included personal growth and empowerment, performance, education, fitness and healthy lifestyle, celebrating diversity, high-quality technique, serving the community, and creativity, among others.

Schools use a variety of staffing structures. Respondents had a wide range of paid employees, from 0 to 200, and less than half of schools (43%) also relied on volunteers. On average, schools had 11 paid workers (median), but only one full-time employee. Open-ended comments underscore the diversity of approaches, from all-volunteer organizations, to those that are entirely owner-operated, those with multiple independent contractors or part-time employees, and more. Schools that have been in operation longer tend to have more paid staff, as do those with larger budgets.

Respondents' organizations are a variety of sizes, with annual budgets ranging from \$0 to \$35 million. The median annual budget was \$120,000, and the total budget of all schools combined was \$65.5 million. In another measure of their size, schools served a median of 200 students each. Across respondents, the sector served a total of 81,244 students in 2019.

Most schools do not receive any outside funding (59%), although many do. Private donations are the most common source of outside funding, with 37% receiving such support in 2019.

Student body and staff

Most schools serve a mix of ages, with 82% serving both youth and adult students. A small number, just 6% of schools, only serve adults, while 13% serve only youth. The most common student age groups, with a large majority of schools serving each, are all the age groups between 6 and 55 years old (6-10 years old (82%), 11-13 years old (90%), 14-17 years old (85%), 18-25 years old (86%), and 26-55 years old (82%)).

Respondents gave their best estimates about other demographic characteristics of their students and of staff. Because many schools do not collect information about personal characteristics of their students—a fact that many respondents underscored in open-ended comments—these data should be interpreted with caution, as mere estimates. Nonetheless this analysis provides a preliminary sketch of those providing circus education and those served by it.

Most (54%) did not know how many of their youth students qualified for free or reduced price lunch at school (a marker of low income households). Of those who were able to estimate, most (57%) said it was a quarter or less of their youth students, and 21% said it was over half of their youth students. Schools with social circus programs more often provided an estimate, and they were significantly more likely to report that over half of their youth students qualified (36% vs. 7% of schools without social circus).

In terms of race/ethnicity, respondents estimated that on average, their students were 65% white, 11% Latinx, 9% Black, 8% multiracial, 6% Asian/Pacific Islander, and 1% American Indian. By contrast, they

estimated that their staffs are more homogenous, with, on average, 76% white, 7% Latinx, 7% Black, 5% multiracial, 4% Asian/Pacific Islander, and less than 1% American Indian.

Schools with social circus programs reported serving more students of color. Notably, they served significantly *more* Latinx students than schools without social circus programs (16% vs. 9%), Black students (15% vs. 6%), and American Indian students (2% vs. 1%), and significantly *fewer* white students (56% vs. 70%). However, staffs of schools with social circus program offerings were only different from those without in the larger proportion of their staffs who were Black (9% vs. 5%).

In terms of gender, students and staff were a better mirror of each other, with about three-quarters of each being female on average (77% of students and 75% of staff), and a small number being non-binary or trans (4% and 3%).

Programming

Schools offer circus education programming in a variety of ways. Respondents reported offering on average 6 different program structures, with the most common being workshops (82%), private lessons (81%), youth recreational classes (80%), and adult recreational classes (75%). A third (33%) offered social circus, and nearly as many (29%) offered a pre-professional or professional training program. A majority of schools offer programming for most or all of the year: 76% are active for 10 or more months annually. Schools most commonly reported that their students trained an average of 2-3 hours per week (46%); with another 22% of schools having students who train 4-6 hours per week, and 20% whose students train less than 2 hours per week.

Schools offer a variety of disciplines, most commonly static aerials, which include any non-swinging or flying aerial apparatus (85%). Partner/group acrobatics and acrobatics/tumbling are the next most commonly offered (69% and 66%), and over half of schools offer juggling/object manipulation and hand-balancing. On average, schools offer 6 types of disciplines, though 24% of schools offer only 1 or 2 types of disciplines. Schools that have been in operation longer tend to have more disciplines on offer compared to newer schools.

In terms of most popular disciplines, fabric/silks is cited by 62% of schools as one of the top three—a clear favorite. Next most common is lyra (36% of schools) and trapeze (28%). Acrobatics/tumbling is among the most popular at 23% of schools. While partner/group acrobatics is the second most commonly offered type of discipline, it is listed as a student favorite by only 10% of schools.

A vast majority of schools (92%) reported collaborating with at least one other organization in 2019. Most commonly, they collaborated with education organizations/schools (67%), non-circus arts organizations (67%), other circus programs (55%), and private companies (51%). A bit under half (44%) are members of a professional association.

Performance

A large majority of schools put on performances in 2019 (92%). Each school individually put on between 0 and 85 performances, for a total of 1,720 performances across schools. The median number of

performances per school was 5. Performances were a wide variety of sizes, with between 9 and 46,000 audience members at each one. The median audience size was 200, and in total, 171,379 audience members attended performances by responding schools in 2019.

Insurance

Nearly all schools have insurance, with nearly three quarters (74%) having insurance specifically for circus arts and 24% having another type of insurance. Schools are mostly commonly insured by Borden Perlman, followed by Frances Dean and ISERA. Of insured schools, 18% have ever submitted a claim, and 4% submitted a claim in 2019. Respondents rated their satisfaction with price, customer service, alignment of insurance to their needs, and claim resolution. Overall, respondents are moderately satisfied with their insurance. Customer service is the area of highest satisfaction, with 33% “very satisfied” and 31% “satisfied.” By contrast, satisfaction was lowest on price, where only 19% were “very satisfied” and 24% were either “dissatisfied” or “very dissatisfied.” In open-ended comments, some respondents described feeling frustrated by a lack of options and by the high cost of insurance.

Challenges in 2019

Even prior to the COVID-19 pandemic, circus educators faced difficulties in their continuing or growing their programs: over two thirds (69%) reported having “substantial” or “enormous” challenge in at least one area. The sector’s greatest challenge in 2019 was funding/finances: 30% of schools said it was their top challenge, and even more (41%) of schools said it was “substantially” or “enormously” challenging. Schools also commonly reported struggling with business administration (31% saying it was substantially or enormously challenging), space (30%), and recruiting students (25%). In open-ended comments, educators describe expensive overhead, owners working at capacity, a saturated market, the need for larger and higher spaces, and difficulties subsidizing tuition for students who need financial help.

Impacts of COVID-19

The COVID-19 pandemic has hit the circus education sector hard. Respondents shared information about the scope of the pandemic’s impact on their work as of the time they responded to the survey, between late May and late July 2020. While the impacts have been changing and evolving as the pandemic has worn on, the data here offer a snapshot of COVID-19’s impact on the sector as of early summer 2020.

On average, schools reported lost income of \$30,000 each (median) due to the pandemic, which is a quarter of the median annual budget (\$120,000). This represents losses in only the first 2.5-4.5 months; they are likely much larger to date. Across all respondents, the sector lost \$12.9 million in income in the same time period. A large majority of respondents (76%) reported that they were taking in only a quarter or less of the amount of income from the same time a year prior. Programming was also very low during this time, with 74% reporting they were offering a quarter or less of the amount of programming as the same time a year ago.

Concordantly, a large majority of schools said they had cancelled classes (89%), performances (81%), and workshops (77%). And over two-thirds of schools (68%) had used financial reserves by summer 2020. Many schools pivoted to online offerings, with 60% moving classes online, 24% offering online workshops, and 18% moving performances online.

Alongside changing their programming, many schools sought financial assistance. Three quarters (75%) applied for federal relief through the CARES act; only 62% of respondents received it. Over half of respondents applied for state or local assistance. In total, 90% of schools attempted to access additional income or lower their rent, mortgage or insurance costs; 70% received federal, state, or local assistance. Overall, most schools (69%) anticipated that COVID-19 would have a severe or extremely severe financial impact on them. Yet, at least as of early summer, nearly half of schools (48%) were confident or extremely confident that they would survive the pandemic's impact, while only 17% were not or not at all confident that they would survive.

Conclusions

The AYCO/ACE Circus Census 2020 provides a snapshot of circus education programs during a uniquely difficult year. It is our hope that this information can be used to support the sector in recovering from the effects of the COVID-19 pandemic and continuing to grow as an industry. These data, in conjunction with data from the 2011 and 2018 Censuses and from future data collection efforts, will inform the continued efforts of AYCO/ACE to advocate for circus education in the United States.