

Circus Census 2022



american youth
CIRCUS
organization

Final Report
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Circus Census Team

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Background, Methodology, and Respondents

In 2022, AYCO/ACE set out to conduct a survey of U.S. circus educators for the fourth time in its history.

The purpose of the survey is to gather information on the sector and its scale to advocate on behalf of circus educators.

In 2022, ACE/AYCO partnered with the American Circus Alliance (ACA) to expand the survey to include individual circus workers and circus production companies. Additional questions were also added to capture information from individual instructors and coaches.

This report will focus primarily on circus education organizations, but where applicable, we have included information from the ACA report. The full ACA report will be made available on the ACA website: <https://americancircusalliance.org/>.

The 2022 survey launched in April 2022 as an online survey using Survey Monkey (see Appendix A for a copy of the survey instrument). Survey links were generated and shared via mass emails to the ACE/AYCO member and mailing lists, individual emails, and social media. The survey closed to the public on May 30 and the survey team did targeted, personal outreach to ACE members and respondents who had started the survey but never completed it. This outreach was completed by June 24, 2022.

The initial total respondent count was 714, which included 197 educational organizations, 448 individual workers, and 69 production companies. The raw data was cleaned by removing any entries that did not contain data past the initial question(s) and then any duplicate entries were removed. Duplicate entries were checked to ensure that all submitted data about a specific organization or individual was included. After data cleaning, there were 428 individual circus workers, 49 production companies, and 148 circus education organizations.

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 survey every two years to keep tabs on the shifting landscape of the circus education sector in the U.S.



Role/Job Title

Survey participants were asked about their primary role or job title. Most common responses included:

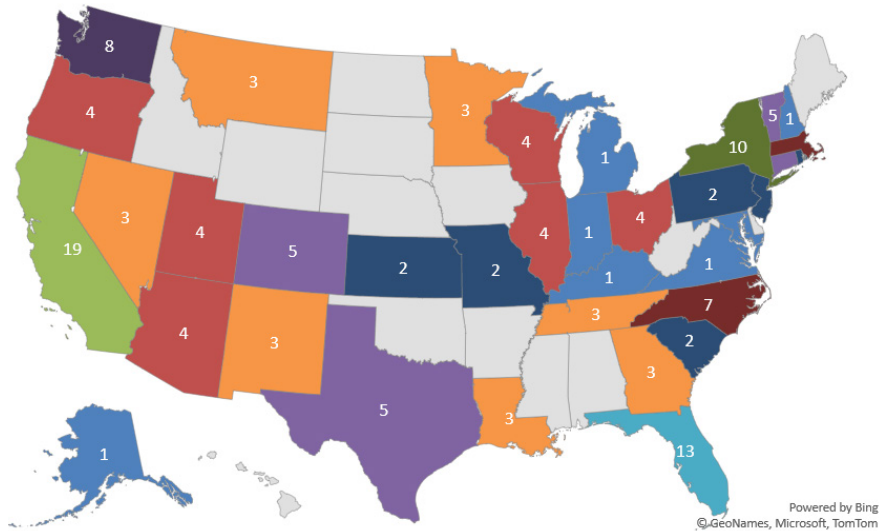
- Directors
- Executive Directors
- Owners
- Founders
- Artistic Directors

Considering the level of detail asked for in the survey around staffing, program structure, and financial information, it was not surprising that most respondents were near the top of the leadership hierarchy at their organization.

States

Survey participants came from organizations located in 38 out of 50 states. California was the state with the most respondents, with 19 organizations reporting it as their base state.

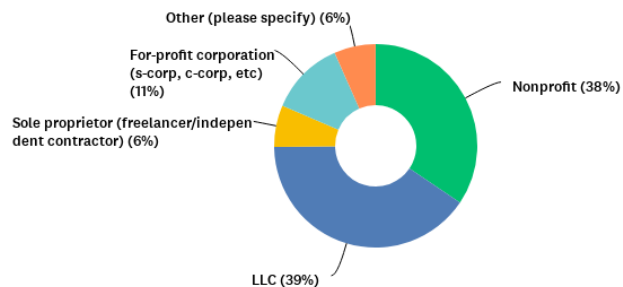
Number of Organizations by State



Legal Structure

Survey participant organizations were split evenly into non-profit organizations (38%) and limited liability corporations (LLCs) (39%). Of the remaining organizations, 6% were sole proprietors, 11% were other corporate structures, and 6% were other, which included combinations of profit/non-profit or college organizations.

How is your company or organization legally structured?



Annual Budgets

Annual organizational budgets ranged from \$0-\$2,437,936, with the average annual budget being \$304,081.

The total annual budget of all organizations combined was \$26.2 million.

While there is no definitive source that lists all of the circus organizations in the United States, during the recruitment phase of this survey, the survey team conducted online research and identified at least 400 individual organizations that are associated with some aspect of circus. Because this list is not confirmed, we can only hypothesize that the total annual budget of circus organizations in the United States far exceeds the \$26.2 million confirmed through this survey.

Funding Sources

The survey asked a question about the type of funding organizations structured as non-profits received in 2021. Private donations made up 90%, 64% came from foundations or corporations, 60% came from government grants, and 8% came from an unspecified source.

Note: This question did not include COVID-19 related funding, which is addressed in a later question.

Note: Participants could select multiple responses, resulting in percentages that exceed 100.

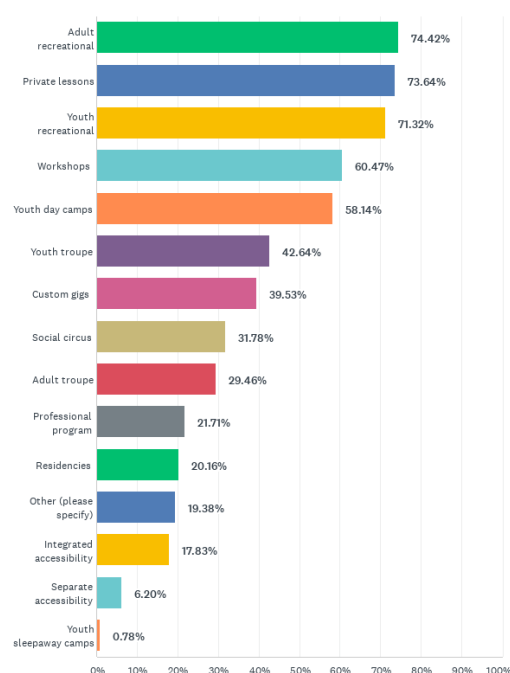
Founding Year

The average founding year was 2006, with the oldest organization founded in 1927 and the youngest in 2022. More than 78% of the organizations surveyed were founded after 2000 and more than 50% were founded after 2010. The year 2015 was the year with the greatest number of new organizations founded, which is 13.

Program Structures

Organizations were asked about their program structures in 2021. The majority (74%) offered adult recreational classes, 74% offered private lessons, and 71% offered youth recreational classes. Other common program structures include workshops (60%), youth day camps (58%), and youth performing troupes (42%).

What types of program structures did your company or organization have in 2021?

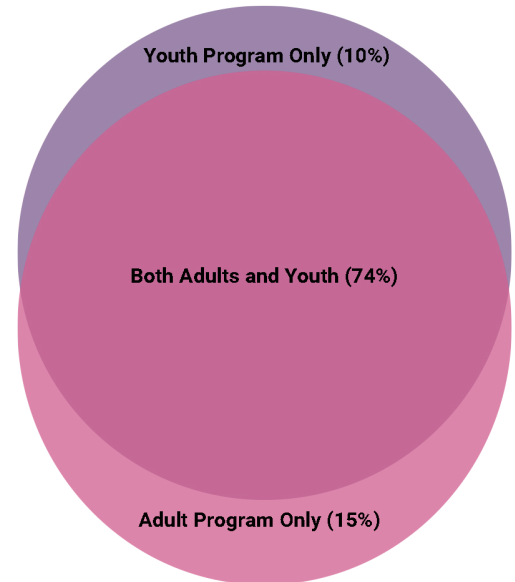




Of the 109 respondents who indicated they offer a recreational program, 10% serve only youth, 15% serve only adults, and 74% serve both adults and youth.

Note: Participants could select multiple responses, resulting in percentages that exceed 100.

Youth v. Adult Programming



Written Policies and Programs

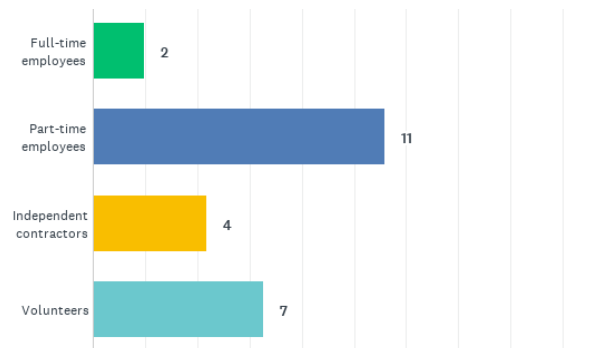
The 2022 survey included a new question for educational organizations about the types of programs and policies they have in place. Of the responding organizations, 48% have mandated reporting policies, 62% have minor safety policies, and 59% have equity, diversity, and inclusion policies.

In regards to equipment and rigging, 66% have a rigging plan and 79% have an equipment inspection plan in place. Other programs and plans include emergency response plan (73%), instructor training and/or experience requirements (78%), and sustainability and climate impact plan (6%). In addition to these listed options, 17% of respondents indicated that they also had other plans in place, including harassment policies, drug/alcohol/substance abuse policies, risk assessment, injury/incident reporting, COVID response policies, and collections management policies.

Staffing

In 2021, organizations had on average 2 full-time employees, 11 part-time employees, 4 independent contractors, and 7 volunteers. Among the responding organizations, 76% of all staff were white, with 12% African-American, 11% Latinx/Hispanic, 10% Multiracial, and 1% American Indian. Most staff (75%) identified as female, while 26% identified as male. Non-binary accounted for 10%, while other was 1%.

In 2021, how many people did you have working on your circus programs at any one time?



Respondents were asked to average the hourly rate for their admin staff and teaching staff. For teaching staff, the hourly rate ranged from \$10/hour to \$100, with an average hourly rate of \$29.75/hour. Admin staff are making between \$11-\$65/hour, with an average hourly rate of \$19/hour.

Independent Circus Instructors

The data in this section has been pulled from the American Circus Alliance (ACA) portion of the circus industry survey. The 427 respondents who identified as individual circus workers were asked if they worked as a circus coach or instructor, and 68% reported they did. More than 75% taught recreational classes at local organizations and 21% taught professional level classes at a local training program. Workshops were also a common source of income, with 36% teaching locally and 24% traveling to teach workshops. Instructors also taught at summer camps (22%) and virtual/online classes (25%). Instructors also taught private lessons, other physical practices like Pilates, teacher trainings, and choreography for performance companies.

When teaching, 42% of instructors work as independent contractors, 26% are employees, and 28% are both. While this section did not clarify if instructors who were both independent contractors and employees worked at multiple organizations, this may be the reason for the overlapping classifications. This would be an area for future investigation in future surveys.

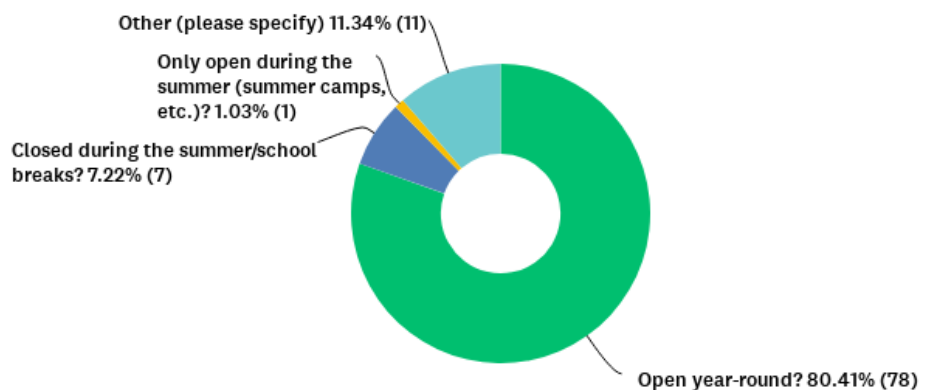
Individual Participants

In 2021, educational organizations reported a range of total participants from 5-5,780. The average number of regular participants in 2021 was 573. The average number of participants in 2019 was 640, but based on open-ended feedback provided by respondents, building back attendance post-COVID has been challenging.

Most participants (42.71%) participated in 2-3 hours/week of classes, rehearsals, and open training, and 34% participated for less than 2 hours/week. Only 4% of students participated for more than 30 hours/week.

Organizations estimated on average, 31% of students were in the 26-55 years age group while 26% were 6-10 years of age. Young adults ages 18-25 made up 22% of student population and 14% were 14-17 years of age. Adults ages 55 and above were 11% of the population. When asked about their program's schedule, 80% of organizations indicated that their organization was open year-round. Some programs only ran during the summer (1%) and some closed during the summer and school breaks (7%).

Is your program:

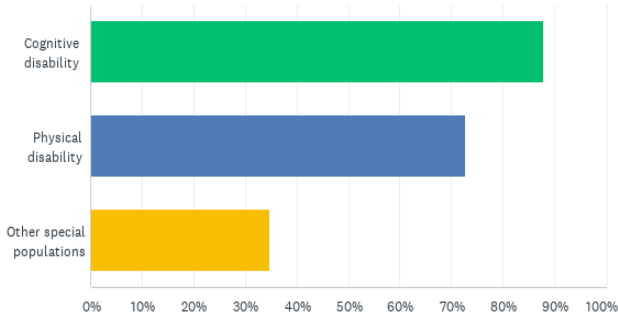




Of the 66 organizations that answered the question about special student populations, 73% had students with physical disabilities, 88% had students with cognitive disabilities, and 45% provided open-ended descriptions of their student populations. These included students who were recovering from drug/alcohol dependency, students with eating disorders, cancer survivors, age-related mobility challenges, students who were pregnant or post-partum, students from the trans community, and students with trauma/PTSD.

More than 64% of students were white, 14% were African American/Black, 14% were Latinx/Hispanic, 7% were Asian/Pacific Islander, 4% were American Indian, and 10% were multiracial. Female students comprised 72% of organizations' student bodies, while 22% of students were male, 9% were non-binary, and 4% were other.

Did your students include any of the following?



Many organizations reported that they did not gather or ask for information on race and gender from their students and staff. Because of this, demographic information about gender and race should be analyzed with caution.

Even so, the data currently shows a student and staff makeup that skews predominantly white and female. This shows opportunity for organizations to proactively increase diversity in their organizations, especially considering that only 59% of responding organizations have equity, diversity, and inclusion policies in place.

Areas of Instruction

Responding organizations provided a wide range of instruction on various ground and air-based apparatuses. The most commonly-offered skill areas include non-bar apparatuses like rope, silks, straps, hammock (78%), bar apparatuses like trapeze and hoop (77%), partner or group acrobatics (58%), acrobatics like tumbling, parkour, or hoop diving (58%), and object manipulation (54%).

Areas of Instruction	Responses
Non-bar apparatus (rope, silks, straps, hammock)	77.89%
Bar apparatus (trapeze, hoop/lyra)	76.84%
Acrobatics (tumbling, parkour, hoop diving)	57.89%
Partner or group acrobatics (hand-to-hand, banquine, dance acro)	57.89%
Object manipulation not including fire (juggling, Diabolo, Poi, plates)	53.68%

Balance apparatuses (slack line, tight wire, stilts, rola bola)	44.21%
Hand-balancing	43.16%
Clowning or physical acting	38.95%
Contortion	30.53%
Pole (Chinese, aerial or dance)	24.21%
Other (please specify)	21.05%
Rebound/bounce acrobatics (trampolines, Russian bar, Korean plank)	20.00%
Swinging aerials (including flying)	14.74%
Wheel apparatuses (Cyr, German, Wheel of Death)	13.68%
Fire manipulation	4.21%

Other offerings include balance apparatuses like slack line and tight wire (44%), hand-balancing (43%), clowning or physical acting (39%), contortion (31%), and pole (24%). Organizations also offered rebound/bounce acrobatics, swinging aerials, wheel apparatuses, fire manipulation, dance, general fitness classes, chains, bungee, yoga, and mask making.

Performances

More than 76% of organizations also produce circus performances, including student showcases, paid gigs, and troupe performances. Organizations reported producing between 1-118 shows per year and produced a total of 682 shows.

On average, organizations produced 9 shows per year and served a total of 193,365 audience members during 2021.

The numbers from 2021 show a healthy return to pre-COVID numbers. In 2019, respondents reported a total of 1,026 shows with an average of 11 shows.

In 2021, the total numbers of audience members from individual organizations ranged between 30 and 100,000. On average, responding organizations served a total of 3,222 audience members in 2021.

Insurance

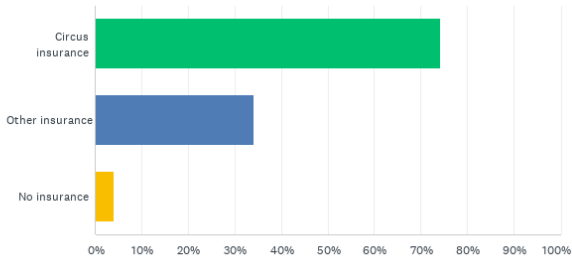
When asked about the type of insurance their organization carries, 74% indicated that they had insurance specifically for circus arts, while 4% had no insurance at all. In an open-ended comment field, 34% of organizations indicated the other types of insurance they carried, including auto insurance, worker’s compensation, volunteer-specific insurance, event insurance, general business liability insurance, equipment insurance, property insurance, and director’s and officers (D&O) insurance.



The majority of instructors (90%) were covered by the organization’s insurance policy, while 11% carried their own individual insurance and 2% were not insured for teaching circus arts.

Less than 24% of respondents have ever had to submit a claim to their insurance provider. While this is a slight increase from the 2020 survey - where only 18% of respondents had submitted a claim - the response rate on this question was much lower in 2022. Only 43% of responding organizations answered this question. While an increase in claims is a trend to note, the lower participation rate indicates a need for more investigation.

What type of insurance does your company or program have?



When asked about price, 32% of respondents reported they were satisfied, while 37% reported being satisfied with customer service and 52% were satisfied with the overall policy. Of the organizations that had submitted claims, 14% reported being satisfied with that process.

In open-ended comments, organizations reported challenges with increasingly more expensive policies, height limitations for aerial arts, and challenges with insurance providers not understanding the unique needs of circus organizations.


COVID Impacts

In 2022, 27% of organizations are back to offering the same amount of programming as 2019. In 2020, only 7% of organizations were offering the same amount of programming as 2019.

Another 29% are offering three-quarters of their programming and 27% are offering at least half of their programming from 2019. The percentage of organizations only offering about a quarter of their 2019 programming is down to 17%. In 2020, that percentage was 74%.

Programming Compared to 2019	2020	2021
About a quarter	47%	17%
About half	13%	27%
About three-quarters	7%	29%
About the same amount	7%	27%

Although programming and income are rebounding, many organizations lamented lasting changes from COVID. Loss of community, loss of student base, employee turnover, and rising business costs



were some of the main effects of COVID-19 that organizational leaders discussed in open-ended questions.

In 2021, 68% of organizations had to cancel regular classes, 53% canceled or postponed special workshops and performances, 50% saw an increase in expenses because of cleaning, increased admin staff time, etc., and 49% had to offer credit for canceled classes or workshops. Organizations also had to move classes or performances online, reduce salaries or lay off staff, downsize, or use financial reserves. 7% of organizations closed permanently as a result of COVID-19.

More than 53% of responding educational organizations turned to external funding sources during COVID-19. In 2021, 73% applied for COVID-19 financial assistance from the CARES Act funding programs, 72% applied for state or local COVID-19 financial assistance, 34% launched a fundraiser or crowd-funding campaign, 39% negotiated reduced or delayed rent/mortgage payments and 16% negotiated reduced insurance costs. Organizations also decreased staff pay, provided their employees with unemployment, raised prices, sold merchandise, and applied for other grants to stay afloat.

Main Challenges in 2021

Organizational leaders were asked what major challenges they faced in 2021. The majority of organizations (between 27% and 34%) reported that funding/finance, staffing, attendance consistency, and business administration were somewhat of a challenge, while between 18%-25% reported the same challenges were substantial.

In open-ended comments, organizations reported that finding adequate space, maintaining good instructors, and generally just “re-grouping” after the last two years are additional challenges. Exhaustion from the stress of navigating COVID requirements and managing fears and expectations among staff and students was another commonly-expressed challenge. Many programs lost staff due to job changes related to COVID-19, while others lost their space or performance venue.

Summary

In summary, overall industry conditions have improved significantly post-COVID. Organizations are rebounding to pre-COVID levels of programming, performances, and revenue. However, lingering effects continue to impact organizations and a general sense of uncertainty about the future is universal among respondents.

The survey also reveals opportunities to increase diversity among staff and students. The data shows that the majority of students and staff are white and female.

While the majority of organizations had several written policies and procedures in place for various aspects of their business operations, there is room for improvement and a more comprehensive and complete approach to safety, human relations, and equipment maintenance.

Circus-specific insurance coverage is another area for further investigation and potential improvement. While 74% of organizations do carry circus-specific insurance, 26% do not appear to



have coverage specific to the industry. Further surveys could investigate the reason for this and work to improve coverage and costs to make coverage more accessible to all organizations.