

Introduction

In 2011, the AYCO Youth Circus Survey gave our organization a sense of scale for youth circus. It helped us to understand where circus was prevalent and how programs operated. AYCO (and later ACE) used that data to increase outreach and support for circus around the country. In the time since then, a variety of programs have been founded and many smaller respondents have grown. With a continuously shifting performance sector, we could no longer pretend that youth circus operated in a vacuum away from circus performers or adult fitness. Thus, AYCO/ACE created a second industry-wide survey.

Engagement in circus as educational skills is at an all time high, but with a wide variety of practices. The aim of this study is to better understand the current scope of the circus industry as a whole and how programs cross between performing, teaching, and advocating for circus arts. We also want to identify sectors that are close collaborators with the circus industry and understand where circus fits into the performing arts scene of the United States and how it is unique.

Methodology

This report is the result of an online survey which was distributed to circus companies, schools, and other related organizations via contact lists, social media, and personal communication. The survey targeted businesses rather than individuals and focus on the United States. Questions were gathered from the previous 2011 survey and others were added for further clarification. All questions were optional. Many respondents chose to skip questions, but all questions had a number of responses. To better compare education programs with large numbers of students who only attended a few hours and programs with a few students who attended more hours, we calculated student-hours by multiplying the number students in a year by the average number of hours attended by a student per year. To place our respondents answers in the wider industry, we gathered further materials using internet-based research of different industry sectors to better understand participation beyond youth circus.

Key Findings

In 2011, before ACE was founded, the AYCO survey contained only 50 youth circus programs. With the inclusion of the wider industry in 2018, we had 165 responses. 120 respondents had programs focused on education, with about 100 of those having a significant population of youth

students (more than 20% youth). At least 28 respondents were more focused on the performing sectors of the industry. We were pleased to find that our response rate doubled among the population targeted in our 2011 survey and even more pleased to see the wider industry willing to participate.

The average age of companies was 14 years old, with the bulk of respondents reporting founding dates within the last 18 years (2000 or later). Geographically, programs were heavily concentrated in three states: New York, California, and Florida. States with no respondents were located mostly in the central United States. In general there were fewer respondents from the central US.

The bulk of respondents had lower budgets with a small number of high budget respondents. Budget mostly came from earned income (84%). Funding continued to be the most commonly reported obstacle for respondents. At least half of respondents reported collaborating with arts organizations and/or education organizations.

Respondents put on a total of 3,000 performances to a total of 900,000 audience members in the last year. There were approximately 30,000 students in respondents' circus education programs with another 110,000 participants participating in one-time workshops. A sizeable portion of clients belonged to a small number of respondents (typically those with high budgets). Circus education programs were most commonly teaching static aerial, partner acrobatics, and ball juggling. A large chunk of allocated resources was going to aerial arts.

With the inclusion of performance companies and adult recreation programs, the average client age range of respondents shifted with the majority of clientele being young and working-age adults. An average of 54% of clients were adults. While 60% of respondents reported at least 1 full-time staff member, the majority of staffing positions were part-time, contract, and volunteer work.

Resources and reach were connected, with high resource respondents reaching more clients and more clients providing income and stability to respondents. Overall, the percent of budget from earned income was unusually high for performing arts. Yet high earned income may keep US circus businesses more independent and agile in a volatile political climate, where

government grants and resources cannot be guaranteed. Dependence on earned income could make client reach a more important source of diverse funding for private businesses than donations and grants.

Customized, variety and traveling troupe circus performance companies likely make up the bulk of audience attendance in the US with aerial dance and contemporary circus are lower capacities. More performance attendance options may help performing circuses be more accessible to larger audiences. Further research with these groups could help illuminate how some performances relate to a wide diversity of audiences.

The reliance on earned income for circus educators means an industry closely linked to economic trends and the students' ability to pay. Future economic swings could cut deeply into the industry as a whole. Putting too many resources into booming markets may soon saturate those markets. Increasing accessibility could help schools relying on earned income to keep a larger, more diverse clientele to help offset changes in student spending abilities, commercial space costs, and shifts in demographics.

General Results

Founding Date:

The average founding date was 2004. Founding dates ranged from 1929 to 2018. There was an abundance of circuses and circus schools founded in the recent decades. 74% of respondents reported a founding date in 2000 or later. The earlier founding dates were sparse, though we know there are a lot more. Through additional research, we found that we did not hear from many of the older circus companies.

Additional internet-based research showed us that traveling, custom, and variety circuses have all been founded in the last decade as well as all forms of circus education, refuting claims that some sectors are a thing of the past. Future research will need to reach out more to these sectors to better understand their current relationship to circus education and to other performing arts.

Budget:

The total budget of respondents was \$42.9 million with an average budget of \$350,000 per respondent. Of the respondents who answered this question, about half had a budget of \$75,000 or less and 15% had a budget of \$500,000 or greater.

Budget was correlated with founding date, with older respondents generally having larger budgets. For example, those with \$1,000,000 budgets or higher had an average founding date of 1986. Those with budgets of \$10,000 or less had an average founding date of 2011. Large budget programs were also more likely to have more full-time staff, greater audience attendance, and more students. It's possible that these programs also had more diverse collaborators, funding sources, a higher percentage of youth clientele, and offered a wider range of skills.

Funding is a major source of sustainability. Circuses with higher budgets are more capable of managing changes in economic trends. Respondents with larger budgets likely managed more economic shifts and lasted longer. We did find that some long-running programs intentionally opted to keep their budgets smaller and focused on mission over growth.

Funding Sources

An average of 84% of respondents' budgets were funded with earned income (tuition, ticket sales, etc). Other sources of funding included private donations (18% of budget), public or government funding (10% of budget) and foundation or corporate funding (7% of budget).

This was a much higher percentage of earned income compared to other performing arts. According to the NEA, 40% of orchestra finances came from earned income and 30% of museum finances came from earned income. In 2000, Grantmakers in the Arts estimated that about 50% of revenue for nonprofit arts was earned income. In our circus survey, only 14% of respondents reported a budget distribution with less than 50% earned income. Those respondents tended to be older, with an average founding date of 1997.

The circus industry's high reliance on earned income may reflect a lack of recognition by funders, but some businesses don't feel legitimacy is a priority. Some respondents reported difficulties navigating government requirements and regulations in general. Some businesses

communicated, outside of the survey, that they chose to maintain a for-profit status to keep a larger amount of control. Focusing on earned income gives businesses a buffer from volatile swings in politics and arts funding. The for-profit status does limit avenues for diverse funding sources. Many other arts industries look to diverse funding sources for sustainability.

Demonstrating sustainability is an important part of applying to grants. Older respondents, with more experience to show, probably had more success accessing diverse funding sources. Smaller budget and younger organizations are likely to have trouble achieving the grants necessary to diversify funding beyond earned income.

Staffing:

Respondents in our survey had a variety of employment structures. Results found a total of 4800 staff, with 2800 paid positions and 437 full-time paid positions. Full-time paid positions made-up an average of 14% of staff positions in our survey.

The average number of each type of staff was as follows:

- Full-Time Paid: 4
- Part-Time Paid: 10
- Freelance/Contract: 10
- Volunteers: 21

Respondents with more full-time staff were older, had higher budgets, and greater audience attendance. Those with more full-time staff also tended to have more hours per student and more student-hours in general.

	Respondents w/ 10+ Full-Time Staff	Respondents w/ 0 Full-Time Staff
Founding Date	1999	2008
Budget	\$1,500,000	\$50,000
Audience Attendance	12,000	3,000
Hours/Student	400	210
Student-Hours	145,000	17,000

There may be a number of underemployed circus staff in the industry. Future individual circus professionals will need flexibility to make ends meet, with experience in business administration and/or adapting to cross-arts skills and knowledge. Young, low-budget businesses are probably part of this phenomenon. Full-time staff become feasible with high budgets. Only about 30% of respondents hired more than 1 full-time staff. Those respondents with the capacity for more full-time staff had increased audience attendance and student engagement, likely resulting in further earned income. Full-time staff build capacity for a business, working on marketing and administrative tasks in their spare time. These staff can also provide extra hours of instruction as needed. Circus troupes and schools in geographic locations that can provide secondary employment may have an easier time finding qualified staff. To completely understand how circus professionals work, we will need future research focused at the individual level.

Business/Program Types

A variety of operation models were employed by respondents and most respondents reported running multiple program in their operations. The average respondent employed 8 different operational models for circus performance and/or education. Only 6% of respondents reported 1 model of operation. The most common and least common programs overall were:

Most Common	% Responses	Least Common	% Responses
Private Lessons	61%	Degree Granting Program	2%
Custom Performance	57%	Traveling Multigen Troupe	8%
Youth Classes after School	57%	Educational Residency	10%
Adult Recreation Classes	57%	Circus Therapy	10%

As we didn't elicit primary business type, it was hard to tell how important common models were to a respondent's business model. Private lessons and custom performances could have been very easy to offer, without being primary sources of income. Through additional research, we found few advertised these services first and foremost. Adult recreation and youth after school operations were more frequently advertised as primary business models. We can tell from the least common responses that we did not do a good job of reaching out to traveling circuses.

Programs requiring extensive up-front training, like degree and therapy programs, were likely out of reach for the bulk of respondents.

Respondents who reported having a traveling performing troupe tended to be slightly older and have more audience members than respondents offering an onsite/local performing troupe counterpart. Traveling circuses go to their audiences and may be more accessible to those who can't travel as far for live performance. Reaching out to more established performance companies may provide insight for younger troupes looking for more accessibility.

Of the education focused respondents, those who reported program circus therapy, adult recreation, and private lesson programs were younger with an average founding date of 2007. Respondents with an educational residency program had the oldest average founding date of 1998. Residency programs (education and artist) had higher average budgets, more program participants, and more audience members.

	Educational Residency	Artist in Residence	Average Overall
Budget	\$500,000	\$800,000	\$350,000
Number of Students	800	900	540
Audience Attendance	10,000	12,000	8,000

Respondents with mobile workshops had more participants than those who hosted workshops at their site. Those that brought youth classes into schools tended to have more clients than those whose programs were youth classes after school. Reaching youth during dedicated school time may reduce competition with other after school programs and provide transportation for those who couldn't otherwise travel without bussing.

	Youth Classes in School	Youth Classes after School	Mobile Workshop	In-House Workshop
Number of Students	710	510	750	660
Audience Attendance	7,000	6,000	9,000	6,000

The number of business models of a respondent did not correlate with founding date, budget, audience attendance, or student numbers. Respondents that were older or those that had higher budgets didn't necessarily have a greater variety of programs. Maintaining several operation models may just spread staff and resources thin. Circus has long brought performing arts to small towns across the US. Circus educators may benefit from continuing the tradition of mobile circus. Bringing circus education into a community seems to have resulted in greater client numbers than expecting a community to travel to a place of business. These operation types may be particularly beneficial for circus schools relying on earned income. Lean, mobile programs can serve as built in advertisement and could be useful to programs trying to grow a client base.

Performances

87% of respondents were involved in performances. Respondents reported 3,000 total performances and 900,000 total audience members. They averaged 26 performances per year with an average of 8,000 audience members per year and 540 audience members/performance.

Additional internet-based research showed us that we missed several of the circuses that were likely to have high audience numbers. Nationally, the largest audience reach probably comes from traveling circuses. Custom circus performances and large circus schools also serve a large number of audience members per year. Variety circus shows also had larger audiences, but were fewer in number from what we could find via secondary research. Those who advertised themselves online primarily as contemporary circus troupes or aerial dance companies generally had lower audience attendance.

Estimated Annual Audience Attendance:

Traveling American Circuses	50,000-100,000
Large Circus Schools	30,000
Variety Circus Shows	18,000
Custom Circus Performances	17,000
Contemporary Circus Performance	4,000

Given our lower response rate among the performance focused businesses in the industry, we estimate that there are approximately 8 million audience members in the United States who attend a circus performance by a US based company and even more who attend an international circus touring in the United States. Circus is comparable to other performing arts. There were approximately 7 million people who attended a ballet performance in 2017 and 15 million who attended other dance performances. Classical music had a nation-wide total of 21 million audience members while musical theater had an attendance of 40 million according to the NEA.

In general, respondents with more performances were older, with higher budgets and greater audience attendance.

	100+ Performances/Year	1-3 Performances/Year
Founding Date	1994	2010
Budget	\$620,000	\$192,000
Audience Attendance	59,000	2,000

Those with higher audience capacity were also older, with higher budgets and greater audience attendance.

	500+ Audience Members/Performance	100 or Less Audience Members/Performance
Founding Date	2002	2009
Budget	\$450,000	\$89,000
Audience Attendance	22,000	1,000

With the circus industry having a reliance on earned income, it makes sense that reaching large numbers of audience members correlates with longevity, funding, and additional reach. Having more performances could increase the chance that clients would be available at any given showtime. High capacity venues could mean a greater potential for affordable tickets. The cheapest, most available circuses could well be the best performing arts option for clients in remote areas or with a lower spending capacity. Even educators may benefit from increasing their performance capacity by just a few shows per year.

Education

80% of respondents reported involvement in circus education with an average of 540 participants, with some respondents significantly above that and 3/4 of responses below that. One response in student numbers ended up being a significant outlier so it was generally removed from student number averages so that those using this report could better compare their organizations. The average attendance per student was 196 hours/year. The average hours of a student’s attendance ended up at about 4 hours/week.

In general, many of the highest participant numbers reported much lower student-hour averages and likely have more high-capacity workshops. In order to compare these programs with more intense, low-capacity programs, we calculated student-hours by multiplying the number of students by the average number of hours attended by a student. The average number of student-hours was 78,000 per year or 1800 student-hours per week. Most respondents provided less instruction than that. About 75% of respondents were below the average number of hours/student and the average number of student-hours.

Those respondents with fewer hours per student tended to have more participants, but fewer overall student-hours. Those with fewer hours per student were also slightly older.

	260+ Hours/Student	30 or Less Hours/Student
Founding Date	2007	1999
Number of Students	350	800
Student-Hours	177,000	88,000

We also calculated the budget per student-hour to better understand how much businesses budget to teach 1 hour of circus to 1 student. This varied widely since many programs also offer performances that weren't part of their instructional business models. The average budget/student-hour was \$8/student-hour and 74% of respondents were less than that. Those respondents with \$1/student-hour or less had more participants, more hours per student, and more student hours. They were somewhat younger with generally smaller budgets.

	\$1 budget/student-hour	Average Overall
Founding Date	2010	2004
Budget	\$133,000	\$350,000
Number of Students	1,000	540
Number of Hours/Student	350	200
Number of Student-Hours	210,000	78,000

More students generally meant less time per student. Respondents that focused on more hours per student had more student-hours overall. Yet programs with high-capacity, low-touch tended to be older. These responses may reflect an early push towards a circus advocacy through workshops but less commitment to long-term professional training. Intense circus education appeared to be more common with newer respondents. The most efficient programs can do both with a large base of dedicated students. Our survey didn't measure impact or outcomes of students. It doesn't say, for example, how a social circus can change some lives forever. For more information on these results, see the AYCO/ACE Weikart study (<https://www.americancircuseducators.org/sel/>).

Collaborators

Our survey asked circuses and circus schools where their collaborators came from. 75% of our respondents had collaborators in at least one category. The average respondent collaborated with organizations in at least 3 different categories. The common sources of collaboration were arts and education organizations. Social organizations, community and fraternal organizations, and private companies were also significant collaborators. These sectors collaborated with

respondents in all budget ranges. Respondents with higher budgets were more likely to report collaboration with some categories in general.

Percent of respondents collaborating with the following sources:

	% of All Respondents	% of Respondents over \$500k
Arts Organizations	53%	67%
Education Organizations	50%	67%
Social Organizations	38%	67%
Community/Fraternal Orgs	38%	61%
Private Companies	37%	50%
Private Foundations	20%	33%
Health	16%	28%
Sports	15%	17%
Religious	14%	22%
Government Organizations	14%	22%
Humanitarian/NGOs	9%	11%

Low budget respondents had a less diverse range of collaborators with an average of 2 sectors of collaboration for respondents with budgets below \$25k. While respondents with budgets above that averaged collaboration with 4 different sectors. Those with collaboration in more sectors had greater audience attendance, more students, and more student-hours.

	Collaborated w/ 8+ Sectors	Collaborated w/ 1-2 Sectors
Audience Attendance	24,000	3,000
Number of Students	650	210
Annual Student-Hours	196,000	18,000

Collaborations could help circus businesses build reach, introducing businesses to a wider net of clientele. As circus businesses can demonstrate better stability, they may be able to work with more collaborators. Arts, education, social, and community collaborators were relatively common among small budget respondents. Starting with collaboration categories that work at all levels can help businesses who are just starting out.

Age Ranges:

On average, respondents were more likely to have adult clients. Overall, 54% of respondents' clients were in the adult age ranges (here defined as 18 years+). The highest average percentage of clients were working age adults, followed by young adults, elementary school, middle school, and high school ages. Many programs focused exclusively on some of these demographics. There were no respondents focused on the lowest (5 and under) and highest (55+) age ranges.

Age Range	Average % of Clients	Highest % of Clients
5 Years or Younger	5%	35%
6-10 Years	19%	85%
11-13 Years	16%	60%
14-18 Years	14%	100%
19-26 Years	21%	100%
27-55 Years	36%	100%
Over 55 years	8%	40%

We looked at client age ranges in different operation models to see if certain programs were more or less likely to cater to certain age demographics. In general, programs that were more likely to have youth were less likely to have young adults or working age adults and vice versa. Circus students have had difficulty transitioning from youth to adulthood program. Many respondents did not offer programs across the transition. While AYCO defines youth at 26 years of age, many responses don't seem to reflect this definition in their operations. The following analysis was based on adults as 18+ as that's the transition reflected by respondents.

Respondents with more adult clients tended to be smaller and newer. Respondents with budgets below \$75,000 averaged 63% of clients in the adult age ranges. Respondents above \$75,000 had more youth clients than adults (46% of clients were adults). Those with significantly more adults had younger founding dates, lower budgets, and smaller audience attendance. Those with more adult clients had more students. Those with a high percentage of youth students had less earned income (72%) and possibly better access to grants.

	90% of Clients above 18 Years	90% of Clients below 18 Years
Founding Date	2008	1999
Budget	\$157,000	\$770,000
Audience Attendance	3,000	10,000
Number of Students	900	500

Operation models that were unlikely to have youth were also unlikely to have adult clients aged 55+. Training facilities, in-house workshops, private lessons, and adult recreation all followed this trend. This may be another side of mobility. Some older adults and young children have less independence to travel to facilities for circus education. Their physical limitations when learning may also be more diverse.

The emergence of adult circus education adds a new diversity of clients. Yet these new sectors that heavily cater to adults aren't necessarily an extension of youth circus programs. These new businesses cater to training and recreational fitness. The lack of a younger population for respondents with these operation models may be an indicator of other inaccessibilities. These programs do have a number of clients to support an earned income-based budget. However, these businesses may find future instability if their economic demographics shift significantly. Future research into the diversity of adult student populations may help reveal additional untapped markets for these businesses.

Skills Education

We asked about the skills taught in circus schools via a massive list that was too long to be considered appropriate data collection. 77 respondents filled out this list. To those respondents,

we extend a massive thank you! Of those skills offered, silks was the most common, followed by ball juggling, aerial hoop, partner acrobatics, and static trapeze. The least common skills were equestrian/animal acts, Russian swing and wheel of steel/death with zero respondents. Mexican cloud swing, sway pole and motorbike stunts were also uncommon. While most of the uncommon skills had higher average budgets, some didn't. Lasso, spinning clubs, and magic were all in the bottom third of common skills with respondent budgets below the average.

Most Common	% of Respondents	Least Common	% of Respondents
Silks	86%	Russian Swing	0%
Ball Juggling	77%	Equestrian/Animal	0%
Partner Acro	75%	Wheel of Steel/Death	0%
Aerial Hoop	75%	Motor/dirt bike Stunts	1%
Static Trapeze	73%	Sway Pole	1%
Tumbling	65%	Mexican Cloud Swing	1%

Respondents offering more skills tended to have higher budgets, earlier founding dates, and more staff. Those with more financial capacity and experience are usually more capable of offering a wider range of complex skills.

	Offering 30+ Skills	Offering Less than 15 Skills
Founding Date	1996	2009
Budget	\$960,000	\$94,000
Total Staff	42	11
Number of Student-Hours	154,000	18,000

Diverse skills may help keep clients interested and contribute to increased hours/student. Respondents with more skills may be able to entice students who wouldn't otherwise be interested in the standard offerings. The average budget/student-hour doesn't need to increase

with the diversity of skills. Those with 25 or more skills had an average \$6 budget/student-hour. Those with less than 15 skills had an average of \$7 budget/student-hour.

Skills Demand and Investment

Static aerial took three of the top five spots in skills offered, with silks, trapeze and hoop all being offered by 75% or more of respondents. Even with how common static aerial is, it doesn't seem to be slowing down. The largest increase in demand was for aerial (35 respondents), with acrobatics, wheel and balance apparatuses also experiencing some increase in demand. Juggling had more respondents reporting a decrease in demand.

Aerial arts was generally allocated a higher proportion of budgets, with an average of 45% of resource allocation going to static aerial and a further 21% going to swinging aerial and 17% of respondents for this question were aerial only schools. No other subset of circus skills had a fully dedicated school. 56% of respondents for this question reported that a majority of their resources went to non-aerial skill instruction. Acrobatics, juggling, and balance were allocated 10-15% of resources each. Clown and bounce/vault skills were each allocated between 5-9% while wheel skills and fire manipulation were each allocated around 1%.

Those that reported more resources going to aerial were younger, with less budget, and less reach in terms of both audience and students.

	75% or More Resources to Aerial	75% or More Resources to Non-Aerial
Founding Date	2006	1999
Budget	\$136,000	\$868,000
Audience Attendance	2,000	16,000
Number of Students	120	890
Student-Hours	17,000	108,000

Aerial skills have exploded as instructional skills and the demand is currently high. However, diversity across sectors may be just as important for long-term, accessible operations. Aerial-only businesses could have additional limitations on operational space and the ability to travel to students and audiences. Those respondents with the majority of resources in aerial had more hours/student but fewer student-hours overall. They reached fewer audience members and participants. The reliance on a smaller number of dedicated students could make their client base unstable given an economic shift. As aerial reaches market saturation and new businesses appear, these respondents risk losing their few dedicated students to other businesses.

Geography:

In addition to aerial skills, certain geographical locations seemed to have exploded in popularity. Respondents were clustered mostly on the coasts. 30% of respondents were located/headquartered in New York and California with a large number of responses also coming from the South Atlantic and New England areas. There were a sizeable number of programs in the central areas. About 27% respondents were located in the central and mountain areas. Lots of respondents seemed to be reporting from heavily urban areas, but we weren't able to include deeper analysis in urban locations in the scope of this project.

Despite their near-equal number of respondents, California and New York have very different respondents. New York respondents had higher average audience attendance. California respondents had an older average founding date. California respondents had higher averages in educational measures, with more students and student-hours.

	Overall Average	NY Average	CA Average
Founding Date	2004	2005	1998
Audience Attendance	8,000	15,000	7,000
Number of Students	540	530	1,100
Student-Hours	78,000	92,000	118,000

New York has a robust live performing arts scene through Broadway which could support more performing businesses. The schools in the area may cater to local dancers and actors who need additional skills. Some California schools in LA can likewise cater to screen actors looking for an edge to support its training schools, but there's less of a live performance scene to support employment of circus-focused performers. The abundance of older programs in California could suggest a cultural connection, like the emergence of new circus in the Bay Area. This could also explain why Florida has a large number of programs, being a cultural circus hub.

Areas with a strong cultural base and cross-arts capacity may help local circuses support part-time professionals. Circuses outside of these areas could still build connections among other artists and local historians, as well as traveling circuses performing in their area. Traveling circuses may have a new opportunity to reach out to a dedicated base of advocates when in areas with local circus education. Hiring a local act or two could help provide income for part-time teachers while providing a cultural connection to the area and a source of pride for local students and the community at large.

While popular markets offer an abundance of clients and public transportation for those with mobility issues, they also come at a cost for space. In general, the urban setting of many of the programs means they are competing in hot real estate markets for rare open space. Space was a frequently cited issue among respondents. Urban realty issues may be compounded by commitment to aerial which requires cubic footage and strong ceilings. Competition in New York and California may reach market saturation, spreading students thinly across a multitude of schools in a tight real estate market. Having a mobile program that can reach untapped pockets of these areas may help businesses reach a larger diversity of clients for long-term sustainability.

Insurance

Almost all respondents reported that they had insurance (108 respondents). Only 5 respondents answered that they didn't have insurance and 3 of those were not involved in performance or education. 82 respondents had insurance in circus specifically. Many (61% of question respondents) were happy with their insurance, but a portion were reserving judgement until they had to submit a claim.

Insurance was cited as a problem for some newer programs. Advocacy efforts are spreading coverage, but searching out new competitive insurers could better help small circus businesses.

Obstacles

We asked respondents for their biggest obstacle for growth. While wording may need to be altered in the future, this open-ended question provided a wealth of information. The most common answers were funding (40 respondents), space (31 respondents), and staffing (26 respondents). Other obstacles included business administration, community outreach, attendance consistency, and public image/legitimacy. However, the most common answers varied based on budget.

The respondents with budgets \$75k and below had more space obstacles than funding. Their space issues had more to do with controlling or sharing space than space suitability (running out of space or ceiling height). They reported more difficulties within the industry, including market saturation, industry support, and attendance consistency.

The respondents with budgets between \$75k and \$200k had more reports of funding and staffing obstacles than space, with finding and retaining qualified staffing becoming a major issue. Business administration needs continued to be an issue. Above \$200k, space became reemerged as an issue as respondents reported running out of space for their programs. These respondents also reported difficulties with mission, motivation, and making sure their organization properly represented the communities they serve. Their wording for obstacles also shifted from doing administration work personally to finding business oriented staff.

Respondents over \$500k continued to report funding as the greatest difficulty, but their big concerns were more focused on public interface. They reported issues with managing expectations of the public, finding collaborators and demonstrating legitimacy and safety.

Many small business issues focus on building infrastructure. The early complaints about market saturation and attendance consistency for small business respondents may suggest that not all respondents have managed to reach a diverse clientele. The emphasis on place may also indicate a blind spot among some smaller budget respondents to the advantages of mobile programs. Midrange programs are more likely to have administrative and staffing needs.

Collaboration may be a solution, sharing administrative duties and finding opportunities for qualified employees to make a living wage. Larger programs have a difficult task as public faces of the circus industry. Internal community support could provide advocacy opportunities for all. Internal cross sector collaboration between performance troupes and schools could also provide learning opportunities for students and additional funding for circus troupes.

Conclusion

The circus industry of the United States has a unique ecosystem. Most respondents had high earned income compared to other performing arts. For non-profit arts organizations, diversifying funding sources can help keep access affordable. For some circus organizations, grants and collaboration may help. Other responses seemed to indicate diversity within earned income. Longer running programs with more funding have more clients, both in terms of audience and student attendance, but higher numbers alone do not equate to higher budgets.

Variety and operational mobility seem to be trends among respondents with greater client numbers among both audiences and students. Variety does not necessarily mean lots of different programs, but different skills to offer and a wide network of clients and collaborators. Mobility can be a useful operational model. Respondents with traveling programs averaged older founding dates, higher budgets, and more clients than the equivalent local programs. Traveling programs can reach populations who wouldn't be able to get to off-site spaces and can serve as marketing tools for circus businesses within the community.

In general, creating more options seems to be part of the growth cycle of older, big-budget respondents. Respondents with more performances and higher audience capacity per performance had more audience members, bringing in more earned income. Those who offered and invested in a wider range of skills had more students, older founding dates, and bigger budgets. High budget respondents also seem to have more youth clients, which may indicate that they are also more accessible to a range of ability levels.

The high-accessibility approach may come at the cost of deeper investment per client. In the education results, respondents with fewer hours per participant were the ones with older founding dates and more clients, but not necessarily more student-hours. Deep investment

education seems to be a newer phenomenon. Intense programs seemed to be doing more in terms of student-hours and are possibly creating the next generation of dedicated circus advocates. Relying on a small number of students places a greater funding burden on each student. It will be interesting to see how these programs balance funding strategies, accessibility, and efficient bureaucracy.

There are some potential problems with current trends in our industry. Some questions revealed a trends of uneven growth within the industry, with many younger programs focusing heavily on trendy sections of the market: adult fitness, aerial, and certain geographical locations. These markets were younger and had many students or audience members but not necessarily high numbers of student-hours or audience per performance. With more research, we may determine how narrow client demographics are and how vulnerable they are to economic changes. These bubbles will likely resolve themselves at some point. Some respondents worried these bubbles were saturating the market for more established programs, dividing up clientele beyond what programs had expected.

The US circus industry is both radically changing and yet still full of tradition. Sectors are growing and finding new ways to engage new clients. Yet some of the strategies they are employing have been used by our oldest circuses for generations. Future work is needed, particularly within the industry. Collaboration between circuses, circus schools, and other performing arts may contribute to a more robust industry that allows for both independent innovation and recognized legitimacy. Educators and performers have much in common, but nothing more so than the love of circus.

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