Circostrada Network

THE CIRCULATION OF STREET ARTS AND CIRCUS ARTWORKS IN EUROPE - 2011

EUROPE

Because one of our objectives is to better understand these sectors, Circostrada Network wanted to use the 2006 qualitative study "Circulation of circus and street artworks in Europe" and the indicators established then, to evaluate the impacts of the world economic crisis on our sectors. Like other networks and international organisations, we hear every week terrible stories of grassroots organizations being forced to downsize or even close down their activity. We wished to update the previous sample survey, by comparing the figures collected for the financial year 2006 with the ones for 2010, in order to get an (incomplete) picture of the situation.

The results of the study were collected by the researcher Anne Tucker (based in the United Kingdom), and this work must be seen as what it is: not ambitious! Nevertheless, the analysis of the collected data has already provided important indicators for the economy and companies' mobility. Through a thorough economic analysis of small sample of European companies, the study provides brute data on creative teams' budgets, show sales, number of performances, and their presence within the country of origin, Europe and the rest of the world.

This research has been conducted by Anne Tucker – The publication was coordinated by Yohann Floch – Acknowledgments to the researcher Anne Gonon (HorsLesMurs)

Education and Culture DG
Culture Programme

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HorsLesMurs

HorsLesMurs is the French national information centre for street arts and circus arts. Created in 1993 by the Ministry of Culture and Communication, since 2003, it has been the general secretariat of Circostrada Network, European platform for the street arts and circus dedicated to information, observation and professional exchanges. Representing 62 members from 18 countries, the network is working to develop the structuring and recognition of these sectors in Europe.

Picture: Claire Ducreux, Barco de Arena © Henry Krul – Graphic Design: Marine Hadjes

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Introduction

Collecting figures and evaluating the influence of the circus and street arts in Europe (in terms of funding, employment, impact, etc.) is a seemingly impossible feat. These sectors are still considered to be a sub-category of the theatre in a majority of countries within the European Union. How much public funding has been allocated to this sector? This is one of the many questions that remain unanswered to this day, since the circus and street arts are generally not dissociated from other sectors in the widespread, hotch potch national/ European statistics on the performing arts.
Because one of our objectives is to better understand these sectors, Circostrada Network wanted to use the 2006 qualitative study "Circulation of circus and street artworks in Europe" and the indicators established then, to evaluate the impacts of the world economic crisis on our sectors. Like other networks and international organisations, we hear every week terrible stories of grassroots organisations being forced to downsize or even close down their activity. We wished to update the previous sample survey, by comparing the figures collected for the financial year 2006 with the ones for 2010, in order to get an (incomplete) picture of the situation.
Let's quote here lamented Dragan Klaic: "The recession is biting heavily but it seems not so severely as to force our colleagues to consider some radical options that would in a significant way alter their NGOs and their position. The recession might be over statistically but high unemployment and the reduction of public and private money for culture will be felt throughout 2010 and probably 2011. The essential struggle is not for more money but for the appreciation and affirmation of culture as a public good rather than just commercial commodity." (in session "Sustainability of Cultural NGO's in the Current Economic Crisis" at the IETM meeting in Vilnius, October 2009).
The results of the study were collected by the researcher Anne Tucker (based in the United Kingdom), and this work must be seen as what it is: not ambitious! Nevertheless, the analysis of the collected data has already provided important indicators for the economy and companies' mobility. Through a thorough economic analysis of small sample of European companies, the study provides brute data on creative teams' budgets, show sales, number of performances, and their presence within the country of origin, Europe and the rest of the world.
Of course, a quantitative survey is still needed to study a larger panel of artistic companies. Such a study would provide a more complete image of the circulation of street and circus shows in Europe. This large scale work would help to better evaluate impacts of the economic crisis, better understand the current reality of artistic companies and to assess the international portion of this distribution.

Yohann Floch
Coordinator, Circostrada Network

Still thriving!

One of the most heartening features of this updated survey is the relative health of so many of the companies surveyed. I began the update fearing that a significant number of groups might have closed their doors and many others be struggling badly in view of the very difficult economic climate in Europe over the last few years. This survey will show that most of the groups are still managing to create and present their work, frequently beyond their national borders. A few have grown quite dramatically in the four years since this survey was first undertaken; the majority have had to work hard to keep their organisations afloat; some have had to find alternative financial arrangements, whether that be accessing public funding, changing the focus of their work in part, or adding new elements or spending less of their year working as artists.

It is perhaps pertinent at this moment to point out that the statistics used in this update are from 2010 - a year in which the economic impact of the 2008 'credit crunch' was starting to be felt; though as yet Europe and the Euro did not seem to be anything to worry about; individual countries' deficits were not seen yet to be as influential on the political and cultural life of European citizens as they have now become. Much of the anxiety expressed by participating companies in this survey refers to the more recent challenging landscape, rather than to the financial evidence presented from 2010.

Having described the relative resilience most of the companies surveyed, I must still comment on how relatively frail many groups are. As in 2006, a tiny minority of groups (four surveyed) have a turnover of over 500,000 Euros, half of them survive on less than 200,000 Euros and 19 on less than 100,000 Euros. Seven companies have closed down in the last four years; six of these were all in the under 50,000 Euros bracket.

Most companies are certainly anxious about the future; the majority have a turnover of the same or less than they did four years earlier; some are clearly struggling. An ever tighter "pincer action" is in operation at present - a contraction of festivals and events that employ street and circus companies; alongside the collapse of cultural funding for artists to create outdoor (or tented) performance work. Resources are extremely tight.

The 47 groups who have taken part in this updated survey have fared very differently over the last four years. The French companies are all facing lower budgets, most of the British and Irish have increased their revenue, as have the two remaining Portuguese companies (surprisingly as they have been most vociferous in declaiming recent funding cuts!). Otherwise there seem to be no particular patterns of growth or decline: the percentage rise of British companies is the highest, but other countries also saw artists with rises of 50% or more. Many have no full time paid staff; almost all claim they have a pool of freelance workers that they pay by the project or booking; an examination of financial turnover set against the number of personnel listed shows that many must earn way below what they would need to live - they either work for several different groups, have other jobs themselves or come from households with another earner.

Public subsidy continues to play a part in street arts and circus companies' budgets. However, it appears to have shifted its focus - more companies are receiving grant aid from the State in order to undertake community arts projects or other social engagement activities (with disabled people, schools, deprived neighbourhoods and other social priority groups). There may therefore be less time to perform shows in the conventional sense – selling to festivals and events. Yet one third of companies across all scales earn 100% of their turnover from fees for booking out their shows . Some have found that the limitations of working with state funding is quite problematic for them, others relish the freedom of movement and artistic licence they retain by being wholly independent. At the other end of the spectrum, private sponsorship seems to have completely collapsed.

As in 2006, the number of performances undertaken in a year shows an enormous range – smaller, cheaper shows often being booked over 100 - 300 times in a season. Most companies have more than one show available and they may have been touring these for a number of years. Of shows that have stopped being sold, the most common reason for this was lack of interest from promoters over several years - where storage is a costly feature of an annual budget, an unbooked show is not sensible economics.
Other reasons include price and scale of shows in themselves (number of performers, unwieldy sets, production costs) making some unsustainable; boredom and lack of creative drive; illness or artists with unique skills leaving the company.

Street theatre and circus shows tour widely, across Europe and beyond... A common language, former colonial ties or link to a common regime, neighbouring countries, or a similar sense of humour are all determining factors in the circulation of artistic works. Many of the shows use little or no text and are highly visual, enabling them to tour to many different places and audiences. The majority of artists in this survey insist that they need to work across Europe, as the home circuit of festivals and outdoor event opportunities is too small to sustain their work over several seasons. There is some discussion about the relative merits of performing at festival showcases attended by many programmers – it is useful, even essential? Or merely exploitative? What are the best ways of 'being seen' by potential bookers? Once you get started, how easy is it to sit back and wait for the phone to ring?

Most of the companies surveyed took marketing extremely seriously, use a plethora of different approaches, from conventional publicity to DVDs, sophisticated websites and other digital media – Youtube, Facebook and others, as well as visiting festivals, inviting programmers and working with professional agencies. Their websites are much more sophisticated than four years ago, are interactive and often can be read in more than one language. But they still come back to the most basic fact, that their shows need to be seen to be booked. And to be seen abroad incurs significant costs. Travel costs and taxation, along with complex health and safety legislation that differs from country to country, are seen by people new to the European circuit as daunting, if not prohibitive. The most successful groups appear to cultivate a network of programmers and festivals and work within that circuit; others play a much wider field. Companies are working hard to improve the range and quality of relationships with both funding organisations and programmers, agents and organisations that book tours. And everyone is looking for advice and suggestions as to how to improve their circulation.

With that in mind, questions were asked about training needs; many groups already undertake training – especially skill-based activity for artists; people also mentioned administrative and legislative training and of course marketing. Business development was mentioned by some – but a majority of groups cited that the reason they did less training than they might like was for lack of time as they are working too hard!

Perhaps the most significant section of the research has been the discussions with companies about their response to the economic downturn across Europe and how they are facing up to its challenges. Comments are articulate and frequently anxious, but illuminate very clearly how workers in this sector are responding to cuts in the funding available to the arts and culture in every country. Of course this is a tiny target sample of artists working in street arts and circus; others may have different experiences.

Many companies expressed their real anxiety at loss of direct funding and lessening of festivals to sell their work. A number of others say they have not suffered at all, their funding is secure (or even increased), their bookings constant. Some have had to change the focus of their work – longer term participatory projects have become more common, attracting different funding.

Some added information about the psychological damage done by the continuous 'media circus' about cuts and hardship – if everyone needs to tighten our belts, then culture is very much secondary in importance. This was mentioned on many occasions, often coupled with comments on the growing tendency by programmers to buy the cheapest rather than the quality shows available; or the populist at the expense of the experimental.

Asked more specifically about their vision for the next four years, there was again a fairly wide range of response. Some clearly do not feel they can plan more than a year ahead, others feel able to trim without losing the focus of their work, a few are excited about new possibilities (mostly companies with some kind of a cushion of public funding) and a remarkable number just feel they will carry on as now! On the specific question of sustainability and how companies are re-organising if necessary to survive in the current climate, there are a number of different trains of thought. Companies in receipt of grant aid (mostly British) are the most confident – the money can keep them going while they develop their future directions and projects alongside their existing work – and they have often clear plans; around half the companies surveyed are clear about what may need to be done, but reluctant to begin to put this into practice until essential; the remaining ones are either not thinking about it yet, or cannot see a survival path as yet. And as always, there are some companies who feel things will improve and their projects bounce back. There were no obvious similarities – the size of company did not seem to have an over-riding effect, nor did the country of origin. Some companies have located alternative funding sources, others have decided to cut staff or resources; still others more dramatic exit strategies – much smaller shows, or working indoors, or a mix of non-arts activity.

And there are a few groups who, in spite of very clearly analysing the problems of festivals, promoters and funders, are convinced that if they work a little more at finding more events and market themselves better, that work will come! It is that optimism, determination and the passion for the importance of this work to be understood that will carry many of these groups through the next few years – adapting, reworking and presenting their material in ever new creative ways, to enrich the lives of the many thousands who see them in action. Long may they thrive…

Analysis of companies

(1) Home countries of companies

Country	Street		Circus		Both		Missing 2011
Year	2006	2010	2006	2010	2006	2010	
Austria	2	2	–	–	–	–	
Belgium	5	3	2	1	1	1	2 street closed 1 circus no reply
Bulgaria	1	1	–	–	–	–	
Croatia	1	–	–	–	–	–	1 street closed
Czech Republic	2	2	1	–	–	–	1 circus no reply
Denmark	–	–	–	–	1	1	
Finland	–	–	2	–	–	–	1 circus closed 1 circus no reply
France	2	1	3	3	2	2	1 extra as Finnish company split 1 street noreply 1 circus no reply
Germany	4	2	–	–	–	–	1 street noreply 1 street closed
Hungary	–	–	–	–	–	–	
Ireland	1	1	1	1	–	–	
Italy	4	4	1		–	–	1 circus closed
Netherlands	1	–	1	1	–	–	1 street noreply
Norway	–	–	1	1	–	–	
Poland	2	1	–	–	–	–	1 street noreply
Portugal	2	2	–	–	1	–	1 circus closed
Slovenia	4	1	–	–	–	–	3 street no reply
Spain	4	3	1	1	1	1	1 street noreply
Sweden	–	–	1	1	–	–	
UK	7	6	3	3	1	1	1 street noreply
TOTAL	**42**	**29**	**17**	**12**	**7**	**6**	**7 closed 14 no reply**

Since 2006, 7 companies have closed down.

Reasons for closure included:

> Financial insolvency
> Injury
> Artistic difference causing split, followed by closure
> Decision to work with other groups
> Decision to do more training
> Had enough!

(2) Longevity of companies

Obviously there was no change here from the 2006 survey.
The 7 companies that have closed had been in existence for varying lengths of time, but only one longer than 10 years.

In the case of companies not replying

> 3 have been too busy on tour,
> 3 others promised but the results have never arrived
> 1 has very recent change of staff who does not know information
> 7 have been contacted but with no response.

(3) Annual income (Euros)

		2006		2010
Under 50,000 €	13	Austria, Belgium, Portugal, Poland, Slovenia, Germany, Denmark, Croatia, Finland, Czech Republic.	5	Austria, Slovenia, Denmark, Czech Republic, Spain
51,000 – 100,000 €	14	Germany, Austria, Netherlands, Belgium, Spain, Italy, Portugal, Bulgaria, UK, Finland, Czech Republic, Sweden	13	Germany, Austria, Netherlands, Belgium, Norway Italy, Portugal, Bulgaria, UK, Finland, Czech Republic
101,000 – 150,000 €	8	France, Irland, Germany, Spain, UK, Slovenia	5	Germany, Poland, UK, Portugal, Italy
151,000 – 200,000 €	7	France, Italy, Norway, UK	6	France, Italy, UK, Spain
201,000 – 250,000 €	2	France, UK	5	UK, Spain, Sweden
251,000 – 300,000 €	5	France, Spain, UK	4	France, Ireland, Belgium
301,000 – 350,000 €	2	France, Belgium	3	Ireland, Spain, UK
351,000 – 400,000 €	–	–	–	–
401,000 – 450,000 €	1	UK	–	–
451,000 – 500,000 €	–	–	1	France
501,000 – 550,000 €	2	Irland, Netherlands	–	–
551,000 – 600,000 €	–	–	1	Belgium
601,000 – 650,000 €	–	–	–	–
651,000 – 700,000 €	2	France, Italy	–	–
701,000 – 750,000 €	1	Belgium	–	–
751,000 – 800,000 €	–	–	1	Spain
Over 1,000,000 €	2	Spain, UK	1	UK
Over 2,000,000 €	1	Italy (prod. house)	1	Italy (prod house)

Points of Interest:

> One Belgian company had to use figures from 2009 as 2010 accounts were not available.

> For the purposes of comparison, financial statistics for British companies have been transferred from Sterlings into Euros. However, the exchange rate in 2006 (1.4) was very different to that in 2010 (1.1). It therefore looks as though their budgets decreased more steeply than would be the case if measured purely in Sterling.

> It is distressing to note that 20 companies (from 47) had a lower or identical budget in 2010 to 2006. Taking into account inflation, this is a serious decrease in income.

> There is no noticeable national significance in companies increasing or decreasing their annual budgets. However, all the French companies had smaller budgets than in 2006; and most of the UK companies have increased theirs.

> There is a wide variation of % increase or decrease in budget (between increase up to 600% and decrease of 61%). The largest increase/decreases were all on account of grants received or lost since 2006.

> It must be noted that there is some disparity between what companies include within their budgets – some exclude private work undertaken by company members, others include it; some exclude community arts/social projects, others do not.

(4) How companies acquire their money

	Grants		Fees		Other work eg teaching/ directing festival		Sponsorship	
	2006	2010	2006	2010	2006	2010	2006	2010
0%	25	16	2	0	25	22	55	42
1 – 20%	16	11	4	3	35	20	11	4
21 – 40%	6	6	10	5	4	3	0	–
41 – 60%	12	6	12	6	1	–	0	–
61 – 80%	7	6	10	5	1	1	0	–
81 – 99%	0	1	16	12	0	–	0	–
100%	0	–	12	15	0	–	0	–
No answer	–	1	–	1	–	1	–	1
TOTAL	66	47	66	47	66	47	66	47

Other sources of money included:

> Box office on shows
> Bar income
> Co-production fees
> Income returns from travel costs
> Subs for producing a magazine
> Bank interest
> Grant income for indoor/social arts work
> Festival directing
> Co-productions shown in budget
> Co-productions not shown in budget
> Indoor shows excluded
> Indoor shows includes as unable to separate.

Points of Interest:

a) The single most striking finding from this is that even less income for street arts and circus derives from sponsorship – only 3 companies claimed any commercial income, and the highest percentage was 5% in one case only. Several companies mentioned that sponsorship was impossible to depend on. It is worrying that so many companies in their 'sustainability' conversations mention getting new sponsors on board. How realistic can this be?
b) Many more companies are now in receipt of grants (around two third) although these are predominantly the minority of a budget.
c) More than half the respondents still earn 60–100% of their income directly from fees for their shows, and a third of them earn all their money from fees.
d) There is no immediate correlation between annual turnover and grant aid. It might be useful to undertake further research to ascertain how many of those in receipt of grants get money for their street shows as opposed to educational or community arts work.
e) Several companies did not include their 'freelance'/ outside/ educational work in this survey, as it does not feature in the budgeting of the organisation. Many artists do undertake much work of this nature, in order to earn a living; but it does not show in this graph.

(5) Staffing

Number of staff	Permanent Full and part time		Intermittent/ Freelance	
	2006	2010	2006	2010
0	10	6	4	4
1-5	28	31	13	10
6-10	5	7	8	10
11-15	3	1	4	3
16-20	–	1	6	9
21-30	–	–	9	6
31-40	–	–	2	2
40 - 50	–	–	1	–
50 - 60	–	–	1	2
4000!	–	–	1	–
No answer	–	1	–	1

Points of Interest:

a) Several companies explained that some or all their permanent staff are part-time and involved in indoor theatre/circus or completely other paid work as they cannot earn a living through their street arts/circus business alone. Some companies were not able to disentangle the finances for each aspect of their income.

b) 'Permanent' was interpreted by a number of respondents to mean 'commitment to the company', rather than 'able to earn a living' through this.

c) Street arts and circus companies have skeletal teams and make use of freelance and temporary staff as designers, performers, technicians and tour management/marketing.

d) Respondents work for more than one company themselves; some had great difficulty extrapolating appropriate information on staffing and felt that this question was not relevant to them, or needed much explanation.

e) There was a complete mix of staffing levels increased and cut since 2006. It is possible to say that the companies securing grants this time round also have employed staff; and conversely those with much less income have shed staff. Several companies have employed a member of staff for marketing since 2006, to help secure them more bookings, as the administration is much more arduous than previously.

f) In their fears about the recession, several companies explained that one way open to them to deal with a budgetary crisis would need to be to cut staff.

(6) Analysis of shows performed in 2010

Programmes / No of performances	Home country				Other EU state				Outside EU			
	2006	2010	2006	2010	2006	2010	2006	2010	2006	2010	2006	2010
	Pgm In		Pgm Off		Pgm In		Pgm Off		Pgm In		Pgm Off	
0	3	0	27	23	17	7	47	33	42	30	58	40
1-10	12	8	32	20	20	18	16	11	20	13	7	4
11 - 20	6	9	4	–	11	10	1	–	3	1	–	–
21-50	25	10	2	1	12	5	–	–	–	1	–	–
51-75	8	10	–	–	4	3	1	–	–	–	–	–
76-100	4	3	–	–	1	1	–	–	–	–	–	–
101-150	4	3	–	–	–	–	–	–	–	–	–	–
151-200	2	–	–	–	–	–	–	–	–	–	–	–
Over 201	1	2	–	–	–	–	–	–	–	–	–	–
No answer	1	2	1	3	1	3	1	3	1	2	1	3
TOTAL	**66**	**47**	**66**	**47**	**66**	**47**	**66**	**47**	**66**	**47**	**66**	**47**

Points of interest:

a) The majority of artists still get most of their work in their home country, although there is a reasonable amount of touring within the EU. It has been pointed out that the recession has meant that several companies do not look for foreign work as the travel costs (time and money) are too great for the income they generate.

b) A few companies get more work abroad than at home – they are all groups that write that they have made special efforts with a particular circuit of programmers, which has paid dividends. Only 15% get no bookings beyond their home country – a credit to the mobility of street arts and circus that to date they have travelled far. In spite of their worries about less bookings and programmers paying less expenses, this is not evidenced in their statistics for 2010.

c) Several companies have described interesting tours to other continents, but not in the year we are asking about. It is obvious that artists relish being invited to exotic locations and they do happen, but less frequently. Several companies noted that since they have visited countries outside Europe, there is much more interest from funders in their work.

d) Shows performed by companies with over 100 bookings are still mostly small scale with minimal technical requirements. They come from across Europe, East and West. Most of these companies are ones that earn all or nearly all their income from fees, not grants.

In this questionnaire we asked an extra question about the value of performing at showcase/'off' festivals. This brought a lively response from many.

e) From the results of the questionnaire, companies seem to have done less 'off' performances.

f) This may reflect their growing antipathy with this – several respondents felt the practice was exploitative and only done to get artists on the cheap.

g) A number of companies were very clear that they never perform for nothing – they require the costs they need to outlay as a minimum.

h) There was much more outspoken comment about 'exploitation' in connection with showcase festivals this time.

i) Several companies were awarded travel grants from trusts and foundations connected with their countries to get to showcase festivals abroad.

j) Several companies described how their shows got a major boost following participation at a showcase. In addition, being taken onto network programmes (e.g. Without Walls, In Situ) appears to have been very beneficial for shows to get seen. One company said "now we're just waiting for the phone to ring!"

Possible inaccuracies – the figures given may relate to the number of separate contracts, rather than the number of days, or possibly even the number of times a show was performed (groups may do 1, 2 or 3 shows a day for a daily fee). It has not been possible to verify this in all cases.

(7) Income levels from selling shows

Fee income in Euros	Within EU (Number of companies)		Outside EU (Number of companies)	
	2006	2010	2006	2010
0	1	0	40	30
Under 20,000 €	10	3	11	8
21,000 – 50,000 €	10	11	5	3
51,000 – 75,000 €	15	11	0	1
76,000 – 100,000 €	4	8	3	–
101,000–150,000 €	6	7	–	1
151,000 – 200,000 €	3	1	–	–
201,000 – 250,000 €	1	–	1	2
251,000 – 300,000 €	1	2	–	–
301,000 – 400,000 €	–	–	–	–
401,000 – 500,000 €	–	–	–	–
501,000 – 1,000,000 €	2	2	–	–
Over 1,000,000 €	1	–	–	–
Didn't answer	12	2	6	2
TOTAL	66	47	66	47

Points of interest:

It must be repeated that this is a very small sample of a hugely diverse area:

a) There is a very wide range of fees earned by street arts/ circus companies across the EU. There is a huge variety in the scale (and therefore cost) of shows, the amount of performers needed for each, the number of outings over a year for particular projects, the number of different shows available to tour at any one time. In addition, crucial information concerning whether groups have an agency, a dedicated marketing person, get further bookings in a country once they have been seen once may all be researched in the future.

b) The variation over the last four years is also very varied. Groups have earned more and less in small and large amounts. Nor is there a correlation between grant aid and less bookings needed – some companies have made more on bookings now they have grants. There is obviously a correlation when grants are for social interaction or community arts work as money spent on this is not recouped as a fee.

c) The statistics here may be looked at in conjunction with the section on the changes in the number of shows available, how many new shows have been made since 2006 and their price. It is notable that in many cases fees have not increased at all since the earlier study, and those that have do not reflect the rise in living costs since 2006. It is possible that shows tour with less personnel (some groups do say this).

d) Companies earning very large amounts of money may sell more than one show at the same time. There is a core staff permanently at base and artist teams are brought in to tour each different piece. However, there is a growing cost to this where there are short runs with gaps between, as each show then needs to be re-rehearsed before going out, which is costly. Several groups have stopped shows because the 'gaps' between bookings meant they were not financially viable.

(8) Specific marketing issues related to selling work internationally

Nearly every participating group said that getting work outside of their own country was important; some advocated this very strongly; one replied 'no but it's fun!' A couple of respondents had ceased looking for foreign work as it was too exhausting, or they have a young family; therefore preferred to get work at home. New this time were some responses claiming that it was getting so difficult financially to tour abroad, that companies had elected to stay in their own country – perhaps working less but with corresponding less costs.

Groups added very little to their 2006 comments about the need to sell work abroad.
Reasons cited included:
> To promote the company further afield
> To meet with other cultures
> Opening up of cultures from country to country/cultural diversity
> Artistic exchange
>) Artistic growth, enriching, development
> Bigger market
> Home market is too limited to be able to make a living

However, when looking directly at what marketing spend was budgeted specifically in order to increase the international bookings potential, there was a wide variation in response.

Overall marketing budget as % of annual turnover	Number of companies		Specific budget for international promotions	Areas of marketing						
	2006	2010		mailings	postage	photos	dvd/videos	translations (of publicity/website)	travel to international festivals	internet design/fees
0	4	5	4 no	–	–	–	–	–	–	–
Under 1%	6	7	6 no	–	X	–	–	X	X	X
1-5%	16	21	7 no, 9 yes	X	X	X	X	X	X	X
6-10%	11	6	2 no, 9 yes (3 said over 65%)	X	X	X	X	X	X	X
11 – 15%	6	4	1 no, 5 yes (1 said 95%	X	X	X	X	X	X	X
16 – 20%	0	–	–	–	–	–	–	–	–	–
Over 20%	1	1 (26%)	1 no	–	–	–	–	–	–	–
Don't know/ Not calculated	14	3	8 no, 2 yes, 1 possibly, 3 don't know	X	X	X	X	X	X	X
TOTAL	58	47	58							

Points of Interest:

a) Five companies spent nothing on marketing for their work.
b) Most companies were able to tell me their marketing budgets and understood exactly what it was for – this was a great change from 2006. Still put an average figure (e.g. 8 – 10,000 Euros).
c) Some companies commented on their continued lack of knowledge or analysis of the effectiveness of their marketing spend – and were reminded of this by redoing the questionnaire.
d) Several companies also now pay for a marketing officer whose role in the group is to sell the shows and promote opportunities, at home and abroad.

It was not possible to show that internationally focused marketing brought companies more bookings, or that a lack of it meant few or no bookings abroad. There was a complete range. Clearly groups find a variety of different ways to get their shows booked. They also held strong (and widely differing) opinions as to the usefulness (or lack of) afforded by different marketing spend.

(9) Financial help for touring in 2010

Country	Source of Funding	Amount in Euros
Italy	Assessorato alla Cultura di Bergamo – Instituto Cultura Italiano	3,500
Catalunya	Institut Ramon Llull	992 600
Euskadi/ Basque Government	Basque Government	4,000
Spain	INAEM (Ministry of Culture)	24,000
Belgium	Commissariat Générale aux Relations Internationale de la Communauté Française de Belgique	1,300 1,800
Czech Republic	Czech Centre in England Czech Embassy (several countries)	1,000 not mentioned
Bulgaria	LLL – Grundtvig, Culture 2007-2013 Support for NGOs - Bulgaria	not mentioned
Norway	Norwegian Embassy in Zimbabwe EU programme (Chapitò, Lisbon) Norwegian Authorities, Foreign Affairs	not mentioned
Ireland	Culture Ireland Other – for Australia	15,000 not mentioned
Netherlands	Dutch embassy Switzerland	10,000
France	Institut Français	5,000 direct to Valladolid
UK	Arts Council England British Council	1,028 8,800

Less groups managed to get grants in 2010 than 2006. There have been many cuts in these budgets in recent years.

(10) Companies' difficulties with international touring

This section of the questionnaire was fairly straight forward, though it prompted a lot of individual suggestions and comments.

Most useful tools	Number of Companies
Lists of festivals and programmers	55 (one made it essential)
Information on what styles of work different festivals programme	45 (one made it essential)
New technologies *	12 several groups were not sure what this was so did not respond*
Ability to speak (or find speakers of) other languages	33 (two made it essential)
Information websites on street arts and circus	41 (one made it essential)
Being listed on street arts and circus websites hosted by development agencies and other networks	43 (one made it essential)
A specialist marketing officer within your company	33, plus 6 others who thought it was ideal but impossible to get money for this in reality. Some described their management/ agent as fulfilling this function

* new technologies: this was to include use of Youtube, text messaging, networking sites such as Facebook, Myspace, etc.

Two new categories were added for the 2010 survey:

> Being a member of a network or federation for street artists/circus in your country
> Having one or more agents

It was generally agreed by all that the more specialist marketing that can be done, the better the chance of getting bookings abroad. However, juggling tight budgets means that this area is often under-resourced; artists do not have the time to even do the research needed to make use of these tools. Many respondents wrote at length about their needs.

Points of Interest:

a) Companies have made significant progress in their understanding and use of the Internet, since 2007. Every company had a website (or was hosted on a community space). Contact details were usually easy to find (though sometimes only by email, no phone number).
b) The most useful websites are those that offer the visitor the option of 'skipping' the creative (often time-consuming to download) homepage introductions.
c) An impressive number of sites are now translated into one or more other languages. It is an extremely useful tool, enabling international programmers to do much more than just glance at artists' workplans.
d) Most groups now have video clips on Youtube, and a gallery of photos. These are also highly useful as an initial introduction to the type of work a group/artist does.
e) Several companies on re-reading their responses in 2006 mentioned that Circostrada has been instrumental in putting up details of companies, festivals and other useful information in different countries. However, there is no centralised database that covers all of Europe, every country's festivals and artists. This is a shame and would still be extremely useful, in addition to countries' own information.
f) Surprisingly the social media option was ticked by very few companies apart from British ones. Facebook and Twitter are extremely well used in the UK, and training in social media is regularly offered to artists.
g) Equally surprisingly, the item on having one or more agents to help get bookings was also not popular. Perhaps this was not properly understood as many of the additional comments made by participants cited the need for someone who can help us draw up a good tour, help us access festivals and programmers abroad – exactly what an agent does. Could it be that finance is missing for paying such a person – and the request remains hanging in the air, without any substance? This might be an area that companies should be better briefed on, especially the financial expectations of different agents and their right to represent a company in a whole country or number of countries.

(11) Greatest obstacles to increasing international touring

Obstacles	Obstacles (touring EU) Number of Companies	Obstacles (touring outside EU) Number of Companies	Don't Know
Taxes	17	9	3
Travel costs	41	28	2
Administrative issues (e.g. visas, work permits etc.)	11	11	2

Points of Interest:

These categories altered very little in the updated survey. They are still serious obstacles – getting more so, as festivals are trying to pare artists' costs to the bone.

a) Travel is the single largest burden; in many cases this may be the principal (and first) hurdle that companies face. If unable to pass that one, issues such as taxes and visas do not even start to get considered. For companies with installations or structures, air freight is prohibitive but the time to transport these by sea/road may be logistically impossible unless structures are made in duplicate. Some companies do this, but the logistics are still complex.

b) Companies citing taxes and visas as problems all had considerable international touring experience.

c) Within administration issues, health and safety restrictions were mentioned several times as being very variable from country to country. There were suggestions made about paperwork for customs officers, differing customs about royalty payments, insurance and risk assessments.

d) Few people cited visa restrictions, but there is considerable misunderstanding about the different arrangements for immigration within various EU countries: the UK, Ireland and Denmark are not the same as other EU states - additional visa restrictions are in force for non EU nationals, even if they have the right to travel within the rest of the EU.

e) Specific arrangements for licensing of pyrotechnics, circus tents, seating banks and other structures may be complicated and differ from country to country.

(12) Suggestions for improvements

Here again, most respondents found their original comments still hold true. From the 2006 survey therefore, the following requests for support still stand:

a) Marketing support: people suggested individuals, 'impartial ambassadors' to help companies from one country/region get international bookings, agencies to research administrative and tax implications of foreign working – this does exist in some countries now; to encourage co-ordination between programmers and organise coherent tours across Europe.

b) Marketing support: funding for travel and living expenses to attend showcase festivals, or to bring foreign programmers to showcases in respondents' countries.

c) Travel bursaries to encourage international movement, especially to the developing world.

d) Access to information on:
- similar companies in other countries
- funding streams for international collaborations
- setting up a genuine European touring network, directed by co-operatives of artists and companies, funded by the regions (start small – between 2 countries that are neighbours - and then grow to cover Europe!)
- supporting networks specifically for the presentation and the exchange of artists.

e) Simplified funding systems that are more appropriate for street and circus companies (rather than indoor institutions- dance, theatre, music).

f) Special grants to support circus companies working with big top tents – these are expensive on travel (weight), time (they need several days to rig and de-rig) and people (crew and production staff are skilled, they must travel with the tent). Small companies may rig their own tent but need time to rest before performing! Additional costs are for overnight security.

g) Unifying administrative and fiscal systems across the EU: VAT, foreign entertainers taxes, licensing regulations (fireworks, hazardous materials, tents, etc.).

h) Standardise health and safety legislation across Member States for outdoor spaces.

i) Promotion:
- Public spaces must be preserved as places of social and cultural use. Social cohesion is an essential aspect of EU philosophy and policies, therefore institutions should recognise the crucial role played by artists who engage with the public within the public space.
- All urban redevelopment should use outdoor artistic practice in their projects, to engage with communities so as to create a legacy of positive empathy with the new environment.

k) Greater attention of cultural policies toward street arts and circus, through legislation to prioritise, promote and support greater touring, information and financial support.

Touring shows available

66 companies were included in the first research. In the initial survey, each company listed the shows they have available for touring. These were analysed in an attempt to look at the spread, the reach, the longevity, the price and the number of shows. The results were included as separate pages in the original research. With the update, 47 companies have responded. They have given information about the changes in their repertoire and some of the reasons why. We have considered that only the changes are relevant to compare here; thus the original analysis from 2006 should be used to get background information collected before.

(1) Number of shows

Number of shows available	Number of companies	
	2006	2010
1	9	4
2	10	5
3	15	12
4	6	5
5	11	8
6	5	3
7	2	3
8	0	1
9	0	2
10 +	4	4
Not stated	3	0
Other (all individual events)	1	0

Points of Interest:

Some companies explained that they also do site specific and one-off performances, on commission. Some also run festivals themselves (booking other groups). Over half the companies surveyed (37) have between three and six shows available all the time – and four companies have ten or more shows.

There is such a range of response in the updated survey, that no real patterns are visible. However, the following points can be made.:

a) Some companies that were young in 2006, with perhaps only one or two shows, have increased their repertoire, while keeping the older shows.
b) Some groups find old shows too boring to be artistically stimulating and have stopped them (ie artistic rather than business considerations paramount).
c) Some groups stop shows in order to concentrate on a new project. This is not necessarily shown in these statistics as the number of shows in 2010 may be the same as in 2006, but they are different shows!
d) Some groups have cut shows as they are no longer financially viable, for a variety of reasons:
   - Too large and cumbersome
   - No storage facilities
   - Sets/décor/structures are rotting or rusting
   - Large gaps between bookings make re-rehearsing options very difficult and expensive
   - Shows too expensive on artist/technician time but cannot be done with less
e) Some groups have listed shows that have only been performed once (on commission) but which they would like to get more bookings for.
f) Several describe work they do that is only commissioned for one-off events – in one case fees from these comprise 25% of their annual budget; but these shows are not included in their statistics as they are not 'for touring'.

Possible inaccuracies:

> Companies may or may not have considered listing 'one-off' shows
> Companies may have used 2010 or 2011 when describing bookings and creations of new shows

(2) Longevity of shows

A key feature of street arts and circus companies is that they keep a show in repertoire over a long period of time. This is different from much of the indoor theatre circuit, and to a lesser extent, dance and music.

Some shows have been reworked several years after they were founded. These have at times been listed by companies as 'new shows' and at times as 'continued shows'. Their decisions were respected.

Shows remain in the repertoire of a group often for many years, which enables the company to 'pay off' the production costs over time.

Groups are particularly creative and many are creating a new show every one or two years. Several describe the need to remain creative, even though the money may be tight. In the case of three of the companies that no longer exist, they felt tired of doing the same project and needed to move on, to work in other ways.

As in 2006, many shows have been performed hundreds of times since their creation. It does not always follow that shows created more recently have less bookings than older ones - the variation is colossal. However, it is fair to say that shows that have been running a number of years will be likely to be those that have been particularly successful. Several groups explained in the update that one show was their leading earner.

Although this question was not specifically asked in the questionnaire, several groups commented on the difficulties they face storing shows, especially large ones. The cost of storage space is very high in some countries, and has certainly resulted in shows becoming prohibitively expensive to keep in repertoire. Alongside this, shows have been stopped because they were too large and unwieldy.

(3) Pricing of shows

The very wide range of prices remains, depending on many different things:
- The number of performers on tour.
- The number of technical staff required
- The size and scale of the show
- Equipment and vehicles required

It is not useful to chart a comparison of prices as the variables are very large and companies were not always specific about the above features. Just in this questionnaire, fees ranged from 150 Euros to 25,000 Euros per performance.

Prices are necessarily much higher for circus shows that use big top (or little top) tents as the time and crew needed to erect and take them down adds significantly to the price. Additionally, overnight security is usually required, and possibly fencing.

Several companies made it clear that their fees drop proportionately as the number of days increases in any one contract.

Prices were mostly quoted for fees, royalties and (with smaller shows) technical costs. Larger performances include a technical specification separately.

Almost no companies include travel and accommodation/ food within their fee, though in a few cases (particularly with companies that tour only within their own country), prices included travel costs.

Several companies cited a different level of fee for international bookings (higher) although these did not include travel costs.

There are likely to be significant inaccuracies in any attempt to make direct comparisons between groups over 'value for money' or 'fee structures' for a variety of reasons.

> Companies define 'number of performances' very differently, and also what a performance fee includes. They may have included their fees for one day (perhaps up to 3 performances), or for one performance. In one case, a fee was described as covering "7/8 performances plus 10 days get-in etc, with all costs covered". Another company described a fee as covering one public show and a week of rehearsals with community participants.

> Circus performers can only perform for short periods of time as the work is physically exhausting and demanding. Fees may therefore seem disproportionately high for 'minutes of entertainment given'.

> Shows may be designed for very different audience sizes; fees may appear high when shows are for very small audiences only.

> The larger shows tour with teams of 'backstage staff' that are essential to the effective running of the show and therefore are costed in; yet there may be relatively few performers 'on stage'. Very few companies listed the number of performers/ technicians/ drivers/ manager on tour with each show , making comparison difficult.

> Production costs very enormously – promoters may be asked to fund these to varying degrees; these costs are therefore supplementary to 'fees/ cachet'.

> Outdoor performance (especially large scale) usually needs 'bedding in' time – some shows take a couple of years before artists are satisfied with them; in this testing period, performances with live audiences are essential, therefore fees may be kept low to encourage bookers.

The most salient fact in the updated survey is how little prices have risen since 2006. In many cases they are the same as 5 years ago; if higher, the increase is minimal.
Some companies mention that they are employing less artists/ technical staff in the delivery of their projects as a way of cutting costs.
In the Appendices, there is continuous mention of the struggle in today's economic climate for companies to be given adequate fees and touring costs (travel, production, accommodation and food) as budgets for festivals are tighter and programmers try and strike a harder bargain with groups they invite.

(4) Amount of touring

In recent years, there is a broad spread of bookings, predominantly in the home country (especially with shows in their first year of operation) or in other countries within the EU. Very few bookings are secured outside of the EU.

Where bookings are described beyond the EU, companies have frequently described developing a longer partnership, a 'project' rather than just being paid to deliver a touring show.

The definition of what is 'covered' in the higher fee scales varies very widely – in some cases the fee includes rehearsal time, a 'fixed number of shows' in one place, community participation.
Shows in the more expensive categories are made often in response to particular events – centenaries, celebrations, openings of buildings or spaces; the shows may then stay in a company's repertoire (storage permitting) and be required for similar high profile events on an occasional basis.

Many of the companies did not 'update' the bookings of the shows they were already touring in 2006, so it is not possible to see whether international touring has increased or decreased with many of these. However, with all shows described as new since 2006, the majority of bookings are in the home country.

(5) Use of text

One of the most salient features of street arts and circus is that much of the work is accessible to all, irrespective of language and culture. The work is often highly visual, skill-based (acrobatic circus-based movement) and physical rather than verbal. Where text is used, it is frequently 'nonsensical' or 'universal'.

Where text is important, companies may translate key messages for international performance. Additionally, many street performers are multi-lingual.
One company specifically uses the language of the country they are working in for their performances.

There is no obvious connection between the existence of text and international touring apart from:
> None of the new shows with text that cannot be translated have been booked abroad – they may not want to or have tried
> Respondents' assessment of when text is 'universal' and 'needing translation' varies considerably – the researcher knows several of the shows described with one or other of these definitions, and she is surprised at some of the responses!
> Companies acknowledged that the existence of a lot of text in some of their shows was problematic, in the context of international touring; however they were not unaware that certain shows cannot travel, but others can.

(6) Analysis of changes

This graph presents shows that have been stopped and new shows that have been added.

Companies	Number of shows 2006	Number of shows 2010	Changes	Notes
Zirkus Meer	4	10	1 stopped 7 new	Show stopped as set too weighty and low demand. New shows all small scale.
Sputniks	10	9	4 shows stopped* 3 new	Too many fire artists exist now, so no call for 1 show. *Several other shows still on repertoire but no bookings in 2010
D'Irque & Fien	2	1	2 stopped 1 new	Wanted to make way for new show. New show (2010) doing very well, more bookings in EU than home
Magic Land Theatre	5	5	2 stopped 2 new	New show every 2 years
Circo Ripopolo	1	3	1 new street show 1 co-production	Original show often doubles up with 2nd show as a double boll booking per day. Lots of bookings for new shows, more abroad than home
Cirq'ulation Locale	2	4	1 stopped 3 new	Stopped show 'replaced by another' – maybe new title or reworked show
Quatre Saisons	2	1	2 stopped 1 new	Shows made way for new one, doing well, more bookings abroad than home
Teatre Tsvete	3	1	2 stopped	No demand
Mimotaurus	5	7	2 stopped 3 new	Shows bored them! New show every year, bookings mostly at home
Karromato	3 (1 indoor only)	3 (2 indoor only)	1 stopped 1 new	Couldn't afford freelance artist. Original outdoor show still selling well
Toons	3	3	No change	
Circo Aereo (France)	10	4	1 new	Group has split into 2, with one half now in France. The original survey gave 10 shows, but of these 3 still exist and 1 is new (the other shows kept by the Finnish group or have stopped)
Cirque en Kit	2	4 listed, only 3 described	1 stopped 1 new	
Cahin Caha	2	2	1 'brought back to be reworked' 1 new	2006 'creation' is still not ready because of geopolitical difficulties - working with Israeli and Palestinian artists
Les Souffleurs	4	5	1 stopped, 1 changed substantially including its name, & will be reworked again 2012 3 new	Shows reworked into new projects. New shows all made for special places
Cirque Baroque	6	3(2010) 2 (2011)	2 new 5 stopped	1 Co-production & agreement finished 1 Bookings too spaced out to make it viable to re-rehearse each time 1 to make way for new show 1 stopped because of accident to performer 1 stopped as no bookings bookings for new shows at home or outside EU
Les Zanimos	2	3	1 new	New show doing well
Ton & Kirschen	1	3	1 sopped 4 new	'moved onto new things'
Pas Partout	3	5	2 new	
Circus Klomp	6	8	2 stopped 4 new	Artist with skills left company, 1 show hard to put in deputies. New show every year, only performed at home
Fidget Feet	5	6	2 stopped 3 new	'New styles of work, moved on'
Macnas	All site specific	3 (also site specific	3 new	Only performed once or twice but all have substantial residency weeks with commu-nities before the show is performed
Mabo band	3	3		Musicians reduced from 4 to 3
ATMO	6	5?	1 stopped	Too expensive on techs and scenery, not financially viable

Companies	Number of shows 2006	Number of shows 2010	Changes	Notes
Silence Teatro	5	6	1 new	
Theatre en Vol	4	3	2 stopped 1 new	Shows 'put aside' as performance costs too high, now local artists only
Circus Khaoom	3	3	Same, though 2 'dormant', one since 2006	Funding problems Show too big
Circus Arts	2	2	No change	Additional v small clowning shows
Teatre A Part	5	3	2 stopped 1 indoor only 1 new	New show selling well
FIAR	6	9	4 stopped 7 new	
PIA	3	2	3 stopped 5 new (3 of these only one-off site specific commissions	2 stopped to make way for new work 1 too much infrastructure
Saltimbanko	6	5	2 stopped 1 new	1 Market too small at home, no demand abroad 1 artist pregnant
Sarruga	5	5	No change	
Xarxa	6	7	2 only v occasionally at large festivals 3 new shows	Lots of 1 off commissions – in 2007 50% of turnover New shows (originally commissions) have had limited bookings – may not be tourable
Escarlata Circus	1	3	2 new	Latest one only premiered Dec 2011, so no bookings yet
Markeliñe	1	2	1 new	Original show v popular
Boni	1	4	3 new	Most recent show is 4 person (all others solo)
Whalley Range All Stars	3	4	1 stopped 2 new	1 – storage problems and rusting set new show involves 10 (previous shows 3)
Architects of Air	3	6	3 new structures	Installations rather than shows
Scarabeus	5	3	2 stopped 1 dormant 2 new	1 Too expensive, 1 co-production ended, 1 bookings on ships rare! 1 new incorpora-tes many elements of a former one
BOSi	5	6	2 stopped 1 new	2 Reworking New show commission, only played once
Mimbre	4	1	3 stopped 1 not promoted but still there 1 new	2 too cumbersome 1 too old new show going well
Walk the Plank	6	5	2 stopped 1 not promoted 1 new	1 no demand 1 co-producers changed work new show only 1 performance so far
Gandini Juggling	5	12	7 new	New shows come from commissions
Artizani	14	16	1 stopped 3 new	1 too expensive to sell and store 1 new v large, hard to book out
Ockhams Razor	3	5	2 new	
Faceless	7	10	several not promoted	

Methodology

Aims of this research:

> To update the original survey carried out in Autumn 2007, which collected detailed information from 66 different companies across the Community, focusing particularly on the importance placed on international touring work by artists from these sectors

> The same companies to be approached again, along similar lines, to see how their statistics, feelings and attitudes have changed over the last 4 years

> The original survey used 2006 as the year of study; the update uses 2010. This gives a suitable amount of time for changes and developments to be seen and noted

> To examine how much the global economic crisis may have affected artists working in this sector. In connection with this, a new set of questions on this topic was added to the original questionnaire

> A further set of questions on training needs were added to the original questionnaire

The aims of the comparative information are similar to the original research aims:

> To increase further the knowledge and understanding of the opportunities and hurdles faced by street arts/ circus companies in developing their work across national borders, and how this might have become easier or more difficult over the last 4 years

> To provide comparative information on this work of use to EC commissioners in their work

> To provide information that can be used in discussions, debates and requests for greater recognition and support for artists and infrastructure from these fields

> To see whether there are similar patterns of change and whether these might be related to the country or origin, the size or scale of work of different companies or anything else

Methodology:

1. The same 66 companies from the original study were approached again and asked to redo the original questionnaire. These companies formed the basis of the study
2. Each company was sent their original questionnaire, with their answers highlighted. Updated statistics and opinions were requested; for all information they were asked to comment on and evaluate any significant changes. The questionnaires also included a section on the world economic crisis and training needs. Follow up contact was made to clarify information, add answers that were missing or check queries.
3. Translations were arranged for the questionnaire to be updated in French, Spanish, Italian and German. It was also suggested to respondents from other language groups (Scandinavian, Portuguese, Polish, Baltic and Balkan) that they might answer the more discursive questions in their own language as they were better able to express themselves that way. People were then found to translate these responses where necessary.
4. A comparative assessment of the results was made, drawing out some of the key features common to many, cultural and national differences, the extent of knowledge about touring and access to resources and information.
5. A report has been formulated with useful comparative figures and statistics.

The Process:

In mid October 2011, all 66 companies were written to; nearly one third of them had changed their contact details (phone or email) so new contacts had to be established. All groups were asked whether they were happy to take part again. The questionnaires were sent out by email during November; replies started to come in from mid November and have continued to arrive until the end of January.

It was much, much more difficult to get responses this time – this was because

a) companies were not able to 'choose' to take part because they had the time or the interest (as happened in 2007)

b) several groups have been extremely busy and under pressure with new shows, long tours – including on the other side of the world,

c) some groups were going through financial or other difficulties including staff changes

d) some groups had personal issues – babies born, injuries and illness

It is important to note that in 2007, the original 66 companies self-selected from over 200 originally approached. Numerous others had agreed to take part but never got round to completing their questionnaires by the deadline. In 2011, the research has attempted to get a 100% response rate from the original list of companies

Organisations that had not responded were phoned several times and encouraged to take part. Responses that were unclear or that warranted fuller explanations were followed up.

> 46 companies have made full responses;

> 7 have closed down for a variety of reasons – financial, illness, artistic difference or change of interest; one company has divided into 2, with one arm in Finland and one in France

> 6 have never responded at all, in spite of repeated requests to take part and attempts to phone

> 8 have been in contact with me but their questionnaires have never arrived

Findings from the companies who responded have been entered into a spreadsheet, which can be used for comparative information in many categories.

Additionally, there are several very informative appendices, that contain at times lengthy opinions, explanations and comments made to certain questions.

Results of the research – Presentation Format:

The Report Document	Back up materials (not published)
Index	
(1) Introduction – Aims and methodology	
(2) The process	
(3) Still Thriving! – Narrative that outlines the main points arising from the research updating that has been undertaken during winter 2011	
(4) Analysis of findings from spreadsheet 1 Data from the recent research has been laid out in the same way as in 2007. The findings of each company for 2006 and 2010 are next to each other to make for easy comparison, 2010 figures on the right hand side. From this evidence valuable comparisons, variations and pointers about companies' direct experiences with international touring have been drawn out. I have kept the same charts but added new notes and observations. These are listed as: (I) Home countries of companies (II) Longevity of companies (III) Annual income (Euros) (IV) How companies acquire their money (V) Analysis of shows performed in 2010 (VI) Staffing (VII) Income levels from selling shows (VIII) Specific marketing issues related to selling work internationally (IX) Financial help for touring (X) Companies' difficulties with international touring (XI) Greatest obstacles to increasing international touring (XII) Suggestions for improvements	(A) Spreadsheet 1: company information The spreadsheet is laid out by nation. There are three different sections: (1) General questions on each organisation (2) Specific issues about marketing and selling the work (3) An examination of some of the problems of international touring Each company has two entries, one for 2006 and another for 2010. In this way, comparative information may be quickly seen
(5). Shows available for touring 2011 1. Number of shows 2. Longevity of shows 3. Pricing of shows 4. Amount of touring 5. Use of text 6. Analysis of change	(B). Spreadsheets 2 and 3: Touring shows available The spreadsheet 2 includes: a) Dates of creation b) Names of shows c) Number of performances given since the show was created d) Average daily fee and what this includes (this money is not included in the report as several groups have asked for it not to be) e) Language used in the performance, f) Other languages available (if appropriate) The spreadsheet 3 includes identical information but presented vertically rather than horizontally, with colour banding for the different price ranges as described in the analysis
(6) Appendices (published separately) Detailed responses by companies: these comprise more detailed statements by respondents to particular questions. The content of each of these is summarised, but the quotations are interesting in themselves and are too lengthy to be incorporated in a spreadsheet. They comprise the following topics: From Section 1 (1) How things have changed - General comments on the changes in company profile, finance and performance between 2006 and 2010 (2) The thorny issue of price vs quality (3) Building relationships with programmers and funders From Section 3 (4) Attitudes to international touring From Section 4 (5) Issuers and challenges to international touring (6) Attitudes to training From Section 5 (7) Impact of the global economic crisis on companies' work (8) Prospects for the next four years (9) Sustainability of groups (10) Environmental impact	Information on changes in the number of shows presented, by company, between 2006 and 2010

Circulation of artistic works

Companies participating in the updated survey

Austria
Sputniks
Zirkus Meer

Belgium
Circo Ripopolo
Cie des Quatre Saisons
Cirq'ulation Locale
Magic Land
D'Irque & Fien

Bulgaria
Theatre Tsvete

Czech Republic
Mimotaurus
Karromato

Denmark
Toons

France
Cahin Caha
Circo Aereo
(French branch)
Les Souffleurs
Les Zanimos
Cirque Baroque
Cirque en Kit

Germany
Pas Partout
Ton und Kirschen

Ireland
Macnas
Fidget Feet

Italy
Silence Teatro
Theatre en Vol
Mabo Band
ATMO

Netherlands
Circus Klomp

Norway
Circus Khaoom

Poland
Teatr A Part

Portugal
FIAR
PIA

Spain
Markeliñe
Sarruga
Escarlata Circus
Boni
Xarxa Teatre

Slovenia
Magic Theater
Saltimbanko

Sweden
Circus Arts

UK
Artizani Street Theatre
Whalley Range Allstars
Architects of Air
Faceless
Theatre Compagny
Mimbre
Scarabeus
Ockham's Razor
Walk The Plank
BOSi
Gandini Juggling

Companies who didn't participate in 2011

Belgium
Okidok
Cie Celeste, Sabine
et Lange de Babyk
[no longer exists]
Baby Washboard Show
[no longer exists]

Croatia
Artistika
[no longer exists]

Czech Republic
Krepsko

Finland
Circo Aereo
(Finnish branch)
MedAndraOrd
[no longer active]

France
Baro D'Evel
Mystère Bouffe

Germany
Ulik
Oko Sokolo
[no longer exists]

Italy
Archipelago/ Pantikin
[no longer exists]

Netherlands
Lunatics

Poland
Teatre Prawdziwy

Portugal
Teatro Ka
[no longer exists]

Slovenia
Trupa Aduta
Drulus
Ana Monro

Spain
Animasur

UK
Wired Aerial