The background of the entire page is black, framed by a decorative border of red floral and scrollwork patterns. The patterns are intricate, featuring stylized leaves and swirling lines.

The Future Survival of Danish Circuses

Master Thesis – University of Southern Denmark

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- Business Relationship Management -**

Abstract:

This Thesis is a theoretically grounded case study on the Danish circus industry with focus on which measures the traditional circuses need to take in order to survive – and compete – against contemporary circus and other family entertainment activities in the (near) future.

The Thesis analyzes the current situation for the industry and its main players, determines a new type of core strategy that will help traditional circuses overcome their main challenges and exploit the opportunities in the market, and it presents an action plan that involves as well the marketing as the financial aspect. The conclusions for this part has been reached on the background of i.e. a questionnaire survey with over 70 respondents who have recently visited a Danish circus, as well as interviews with a handful of influential industry insiders including Managing Directors from some of the biggest circuses in Denmark.

The Theses concludes that the traditional circuses in Denmark can only change their downwards spiraling development by working together as colleagues *against* their competing industries, who are stealing their market shares. Cooperation is both crucial when it comes to the financial aspect and in the marketing approach, and because not only their success – but also their survival – depend on it, the author has made a big deal out of highlighting the common ground and synergies for the circuses, rather than focusing on their differences.

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1.0 Welcome to Circus

“Ladies and gentlemen, boys and girls, children of all ages... Welcome to the spectacular world of circus. I am your Ringmaster Mr. Beswayan, and I am about to take you on a journey where you will witness the most extraordinary, fantastical discoveries. So take a seat and prepare to be amazed, surprised, entertained – and ultimately become a little more familiar with the history, the soul and the general state of Danish circuses. Whether you are looking for glamour, danger, animals or acrobats you have come to just the right place, as this performance deals with all – of course presented in a highly professional manner, bringing in references from all over the world, and each act drawing on expertise from the very best within the field. This is Danish circus in a nutshell. Enjoy – and let the show begin!”

1.1 Problem Formulation:

With the above introduction in mind, the overall problem formulation for the thesis sounds:

“What measures – strategic, financial and marketing wise – must be taken in order for Danish circuses to survive in the (near) future?”

1.1.1 Research Questions and Structure:

In order to help answer the problem formulation, a body of 15 research questions will work as guidelines throughout the paper. The research questions have been grouped into six different topics as described in the following, and this division also represents the structure of the thesis as a whole.

INTRODUCING CIRCUS

RQ1: *How is ‘circus’ defined?*

RQ2: *How has circus developed over time? Worldwide? In Denmark?*

DEVELOPING A NEW CORE STRATEGY

RQ3: *With still fewer wild animals in circus, what should be the ‘core’ of Danish circuses in the future?*

RQ4: *What is the traditional Danish circuses' (new) competitive advantage against their main competitors such as Zirkus Nemo and Cirkus Summarum? (which they claim are not 'real' circuses)*

RQ5: *What are the main obstacles and opportunities Danish circuses are facing at the moment?*

COMMUNICATING WITH A CHANGING TARGET GROUP

RQ6: *How has the main target group changed over the past generations?*

RQ7: *How does the target group's expectation of a night in a Danish circus live up to their actual experience?*

RQ8: *What are they missing?*

RQ9: *How is the (new) core strategy of Danish circuses best communicated to their target group?*

ADRESSING THE ELEPHANT IN THE ROOM: FINANCES!

RQ10: *Is 'circus' part of Danish culture? How so?*

RQ11: *In which ways will the possible financial support from the Danish Kulturministerium impact the future survival of circus in Denmark?*

RQ12: *What other measures can be taken to help improve the financial state of Danish circuses in general?*

CONCLUSION

RQ15: *What are the chances of the traditional Danish circuses still being in business 10 years from now?*

Apart from the introduction and conclusion, the four main sections have been structured to cover the four theoretical angles of the problem formulation; that is *strategy, marketing, finance and organization*, which together will give an all-round understanding of – and possible answer to – the problem at hand.

1.2 Methodology:

The methodology for the thesis follows an inductive research approach, which fits well with the case study structure. Where the opposite pole; the *deductive* approach, aims at *testing* knowledge or a certain hypothesis, the *inductive* approach is more concerned with *generating new* knowledge from the data collection, and this is also the case in present thesis.

Popular said, inductive reasoning can be explained as – ‘*theory follows data*’, and what it means is that the case data obtained through primary and secondary research is the starting point, which is then linked to theories, models and frameworks that fits the nature of the particular information, which is then again analyzed and understood in new ways.

We are in other words dealing with a bottom-up approach that goes: observations → patterns → theory to showcase patterns → conclusion and new understandings/ solution to initial problem.

1.2.1 Research Philosophy:

The thesis leans against the interpretive research philosophy, which is one of the dominant research paradigms used to structure, analyze and understand primary research. As the word itself explains, Interpretivism is a research philosophy – a mindset and a way of going about one’s research - that allows for interpretation, subjective reasoning and interaction between the object(s) and the researcher. The basic differences between Positivism and Interpretivism are illustrated by Pizam and Mansfield (1999) in the following manner:¹

Assumptions:	Positivism:	Interpretivism:
Nature of reality	Objective, tangible, single	Socially constructed, multiple
Goal of research	Explanation, strong prediction	Understanding, weak prediction
Focus of interest	The general and representative	What is specific, unique, and deviant
Knowledge generated by	Laws	Meanings
Subject/Researcher relationship	Rigid separation	Interactive, cooperative, participative
Desired information	How many people think and do a specific thing, or have a specific problem	What some people think and do what kind of problems they are confronted with, and how they deal

¹ Pizam, A. & Mansfield, Y. “Consumer Behavior in Travel and Tourism” (1999)

“Essentially, Interpretivism hold that reality is constructed in the mind of the individual rather than it being an externally singular entity” Hansen (2004) explains, and this view is shared by an inductive approach, which allows the researcher to provide subjective reasoning with the help of various real life examples as accounted for by Ridenour, Benz and Newman (2008).

1.2.2 Research Design:

Apart from the various theoretical sources and secondary research used in the process of writing this thesis, the data collection includes a rather extensive body of primary research conducted by the author for the specific purpose of the thesis.

The research design focuses primarily on the qualitative methods i.e. qualitative interviews, which are useful for going more into depth with a topic and viewing it from more angles. All interviews have been transcribed and are available in the appendix.

In order to also obtain a more general insight into themes regarding i.e. target group and consumer preferences, an online/real life *quantitative questionnaire* has also found its way into the research design; ensuring an as all-round and thorough analysis as possible.

I made a Facebook page, which the online survey was linked to, called ‘DEL DIN CIRKUSOPLEVELSE’². In August I also went to the Benneweis Circus performance in Sønderborg, where I handed out a flyer to the circus guests after the show, which also let to the Facebook page.



←Flyer handed out to circus guests

² 'SHARE YOUR CIRCUS EXPERIENCE'

The Facebook page held three main components: 1) *An introduction*, 2) *A motivation/incitement* and 3) *The direct link to the survey on surveymonkey.com*. Of course presented in a colorful circus-like universe to sort of build upon and elongate the circus *feel*.



The 'introduction' features a picture and short presentation of me and my purpose with the survey, and introduces as well the questionnaire ('10 short questions') as the incitement to fill it out.



The motivation/incitement for the families to click on the link and fill out the questionnaire, was the possibility to win a back to school kit, as the survey was conducted in August around the time when the children was going back to school after the summer vacation.

Apart from handing out a physical flyer, the quest for respondents also included contacting various circus guests from all over Denmark, who had shared comments from their circus experience on the Danish circuses respective Facebook pages (Arena, Benneweis, Dannebrog etc.). Furthermore I made a Facebook add to promote 'Del din Cirkusoplevelse' and the questionnaire and to reach more respondents from other parts of the country than Sønderjylland.

Lastly I handed the questionnaire out in person to a group of physically and mentally handicapped adults from Nordborg, who had recently been to the circus, as well as to a group of preschoolers from Dybbølskolen, who I was allowed to visit the week after school started again in mid-august.

Online the questionnaire was mostly answered by adults who had been to circus with their children, so also contacting a group of children and a group of handicapped people, who are both such a big part of the target group for Danish circuses made a lot of sense and has brought the desired diversity to the survey.

The questionnaire survey itself was made up of 10 questions in a mix of open and closed questions, some with multiple choices, and with emphasis on as well a demographic, practical, emotional and evaluating aspect. Section 5.0 and 6.0 will deal more in depth with the results of the questionnaire.

1.3 Sources:

A complete overview of the references used for the paper can be found in the back, following the conclusionary chapter of the thesis. Overall though, the source material is made up of a combination of respectively academic textbooks, -articles and research reports, various circus literature etc., which together with the primary data collection described in the previous, represents the 'knowledge skeleton' the thesis is built upon.

1.4 Limitations:

Though the research and themes covered in the thesis are quite comprehensive and all-round, they are of course not entirely fulfilling. In order to fully disclose the problem from *all* angles, the international perspective and references could have been investigated further, just as more respondents could have been interviewed, the financial aspect dug more into, more theoretical frameworks applied etc.

Due to the scope limitations for the paper, the body of work has been narrowed to focus on only the *most* important issues for the understanding of the topic though, and here concept mapping have been a great help in the selection process.

Lastly, it must be noted, that present Thesis is most of all a theoretical paper, and therefore should not be considered a management report. It should be seen as a strategic tool for understanding the theoretical and analytical background for the challenges traditional circus is facing these years, and for this reason, the more hands-on practical action plan and ideas have been limited to mainly chapter 6.0.

2.0 A Brief Introduction to the History of Circus

Before being able to analyze and discuss the future survival of Danish circuses, we need to establish a framework from which to draw our conclusions. Introducing the historic background of the concept of circus seems like a natural place to start, so the following will be a shift travel in time dating thousands of years back from ancient empires up until today's colorful circus tents on the grass fields of the Danish summer lands.

2.1 The Folktales of Ancient Circus

The history of circus can be dated back to both the Egyptian, Roman and Chinese empire, - maybe even more than 2,000 years back, although there is still an ongoing discussion and debate amongst historians about the *real* origin of what later became known as 'circus'.³ The uncertainty is due to the fact that the stories of circus have mostly been delivered by mouth and folktales, and so it was not until scholars, historians etc. started investigating the origin of the circus, their findings was actually documented and written down.

Some say that the most popular misapprehensions about circus history, is the oft-repeated idea that the circus dates back to the Roman antiquity.⁴ Now, before talking about the history of circus, one must know that the word 'circus' is the Latin word for the English word 'circle', and although the Romans may not have been the first to introduce the concept, they surely *did* use circus as entertainment. The Romans had a passion for chariot-races. Emperors, senators and knights prided themselves on honing their own skills as drivers and to be pleased by the crowds of spectators. 'Circus Maximus' was the main event for this type of entertainment – it was the name of the chariot racetrack in Rome first constructed in the 6th century BCE⁵. Other than race, the event also was used for other public entertainment events such as Roman games and gladiator fights.

As mentioned, it is now believed that the idea of circus dates back even further though, to ancient Egypt, where it all started with the exhibiting of wild and exotic

³ http://www.circopedia.org/SHORT_HISTORY_OF_THE_CIRCUS

⁴ *ibid*

⁵ *ibid*

animals. As armies in ancient time traveled and conquered distant lands, they would come back with exotic animals captured and brought back to entertain the crowds.⁶ The 'shows' would furthermore include a ring – or circle – of performing jugglers, acrobats and ropedancers, so this is perhaps the closest to today's perception of what circus is.

The Chinese branch of circus is said to be dated back 2,000 years to the Qin Dynasty ruled by the first emperor Qi Shi Huang. Here it is believed that circus evolved from the imperial court performers and that it is the adaptations of some of these acts that have been passed down through time to what is today known as 'circus'.. The Chinese came to call the circus 'The Show of Hundred Tricks'.⁷

The conclusion must be that the ancient history of circus have deep roots and can be traced back to most parts of the world, as the concept of entertaining with tricks and animals is an old and widely known phenomenon. Perhaps this is also why circuses are still widely loved by people all over the world, and why it is difficult to say that it is the product of one particular nation or people.

2.2 The Modern Circus is born

The 'modern' circus was developed in England around the 1750's, by Philip Astley who was a circus owner, horse trainer and successful entrepreneur. It was Astley who introduced the 'modern' circus format, whereby a ringmaster introduces a varied selection of acts – including animal acts - that mostly perform choreographed acts to traditional music. This style of circus continued to be the main style of circus almost universally up until the 1970s and 1980s, where the concept of 'contemporary' circus gained momentum.

Contemporary circus has been credited with reviving the circus tradition with its main focus on human skills, drawing from various performing art skills and styles – also many which are not traditionally linked to circus. 'Modern' circus is usually connected with circuses touring in tents, while 'contemporary' circuses are often performed on theater stages or in permanent show venues and arenas. In recent years the lines between the 'modern' and the 'contemporary' styles have started to blur;

⁶ ibid

⁷ ibid

which is an interesting development that will be analyzed further on later in the thesis when discussing how to define the concept of circus. First is here an introduction to the three biggest circuses in Denmark though, which are all rooted in Astley's thoughts.

2.3 An Introduction to the Three Biggest Circuses in Denmark

Denmark is actually one of the earliest nations to adapt the concept of 'modern circus' and it stands out in circus history because two of the very eldest circuses; Benneweis and Dannebrog are still in business today. Together with Circus Arena, they are the three biggest Danish circuses at the moment, and throughout the rest of the paper, they will therefore be the main focal point.

In the 2014 season, there are currently seven Danish circuses touring the country; Benneweis, Dannebrog and Arena, Baldoni, which is a medium-sized circus, and three minor circuses; Arli, Krone and Mascot.⁸ In the next chapters we will familiarize ourselves with their current strategies, opportunities and obstacles, but first here a historic background check.

2.3.1 Circus Benneweis

Circus Benneweis was founded back in the 1887 by August Wilhelm Binneweitz and his son, and is today amongst the oldest circuses in the world to still travel around. August Binneweitz was a German musician, and he travelled around in Denmark with an orchestra called the Braunschweiger Bergkapelle until it was dissolved in 1862 and Binneweitz settled down and married Charlotte Altenburg with whom he got a son named Gottfried Wilhelm Benneweis.

The family lived in Denmark, and in 1887 Gottfried married Marie Bruun, and same year he sought for permission to perform as an artist and musician, which was granted by the police in Vordingborg. Thus was Circus Benneweis now established, and Gottfried became the director of the circus.

⁸ <http://www.cirkus-dk.dk/>

According to history, no other circus in the world has been in the possession of the establishing family for more than 125 years, which makes the story of the Benneweis family extremely relevant in this context of understanding the 'soul' of the Danish circus world, and how to ensure its successful survival in the future.

In the beginning, Circus Benneweis was membered only by the family. Marie's sister Josefine was both deaf and mute, but yet she still played the barrel organ, and Marie's brother, Alexander, was able to do somersaults. There were two horses, but other than that some goats, dogs, pigeons and chickens were the only animals involved in the first shows.

When Gottfried Benneweis passed away in 1933 his eldest son Ferdinand Benneweis took over as the new owner of the circus. In 1915 Ferdinand married Irene Petersen, who had worked in the circus since 1910 as a tightrope walker. Ferdinand and Irene never had any biological children together, but in 1916 they went to a foster care and adopted a foster child named Eli. Ferdinand had two more children of his own out of wedlock though; a son Manfred Benneweis, who became one of the world's finest trainers for big cats (lions, tigers etc.), and a daughter, Musse Benneweis, whose son Sonny Benneweis became an outstanding elephant trainer; one of the best in the international circus world. In 1977 Sonny married Circus Benneweis Sprechstallmeister Nelly Jane, who is another influential character in Danish circus history.

The most influential character is undoubtedly Eli Benneweis though. In 1936 Eli married German antipodist Eva Stensch, and when Eli's foster father Ferdinand passed away in 1945, Eli took over as the owner of Circus Benneweis – a job he turned out to have great flair for.

Under Eli's management Circus Benneweis grew bigger and bigger and soon became the largest circus in the Nordic countries – partly due to his decision to bring more wild animals into the circus, which in 1959 according to Politikens Hvem-Hvad-Hvor amounted to 53 predators (lions, tigers, bears etc.), 55 horses, 14 elephants, 4 camels and 3 sea lions. A number of these were rented out to other circuses all over the world.

Besides the tented travelling Circus Benneweis tour, Eli was also involved in several other circuses including Circus Korona (1948), Circus Beli (1955-1957), Circus Buster (1961), Circus Hans Strassburger (Germany 1954), Circus Palmiri-Benneweis (Italy 1957-1965), Circus Barum (Germany, 1963-1967), and the stable circus in the Copenhagen Circus Building (1970-1990) – making him a well-known, respected and much loved circus persona throughout the circus industry.

Eli died of lung cancer in 1993, and his will stated that Circus Benneweis be left to his and Eva's adopted daughter Diana Benneweis, who has since been the circus' current owner. Diana's biological father was Manfred Benneweis – Eli's half-brother - who had her at a very young age.

Diana's management style is quite different from Eli's, and after the 1995 season, two of the most influential characters in recent circus history – elephant trainer Kim Benneweis, and horse trainer Miller Benneweis (both sons of Sonny Benneweis) - left the circus after internal disagreements with Diana Benneweis. Some say that the circus hasn't been the same since, as both Kim and Miller went on to work for the competing circus Arena from 1997/1998 to 2002. In 2002 Kim was Ring Master at the Swedish Circus Scott. In 2004 and 2005 he then assisted Diana Benneweis by staging the Benneweis performance, but wasn't part of the tour. Miller Benneweis worked for part of a season in 2004 for Circus Dannebrog.

Throughout the years, three members of the Benneweis family – Eli, Nelly Jane and Diana, have been invited by Duke Rainer to judge the most prestigious circus festival in the world; the Monte Carlo Circus Festival. The family has indeed been one of the most influential in the Danish history of circus. Today Circus Benneweis is no longer the largest circus in Denmark, but in the mind of especially the generations from before 1995, it still remains the most prestigious.

2.3.2 Circus Arena

Circus Arena was founded in 1955 By Arne 'Berdino' Olsen. Berdino had no background as an artist, no apparent circus performing skills, and he did not come from a circus family. His middle name 'Berdino' is a combination of the name Bernardi (a famous king), and Dino, which was the name of their circus monkey.

When he was young, Berdino worked in a leather goods company - until 1930, where he went on tour with a small Danish circus named Circus Alaska. During the next 25 years Arne and his wife Lydia performed in many fairs and thus they entered the circus world. In 1955 Berdino and the athlete Abdullah started Circus Arena, which is today one of the biggest circuses in Scandinavia. From 1957 Berdino has been the sole owner of the circus.

From the beginning up until 1976 when Arne Berdino passed away, Circus Arena remained very family oriented. Arne and Lydia's son, Benny Berdino performed as a juggler, and their daughter Jytte performed in trapeze and as a tightrope walker. In 1964 Benny Berdino married Hanne Reinsch, who also joined the circus with a pigeon number. Benny and Hanne also had two children; Susanne and Jackie, who also both joined Circus Arena. Since 1976 Benny Berdino has been the owner of the circus; a role he takes very seriously.

Benny has always had the ambition of being the biggest circus in the Nordic countries, and although the circus has had its ups and downs - including a personal bankruptcy in the 1980's – he has in many ways accomplished that goal.

Besides Circus Arena, Benny Berdino has been involved in a Swedish show called Circus Skratt⁹, owned by the Bo Rönneberg, who has also cooperated with Haddy Enoch from Circus Dannebrog, which will be introduced in the following.

2.3.3 Circus Dannebrog

In 1876 a musician named Theodor Enoch married Wilhelmine Schultz from the Schulz circus family, and joined their circus: Circus Skandinavien, where he performed as a circus musician. From 1878 to 1880 Theodor Enoch owned the circus in partnership with his brother-in-law Emil Kunckel, but later in 1880 he decided to start his own circus; Circus Dannebrog, together with Wilhelmine and their five children: Peter, Louise, Georg, and the twins Johanne and Dorteia.

The circus historic Anders Enevig puts doubts to that specific year though, as he claims that Circus Dannebrog had its first tent premiere in 1897. From 1890,

⁹ The Swedish word for 'laughter'

however, the family – he states - had been performing in markets etc. under the name 'Circus Dannebrog'.

In 1909 Theodor passed away, and Wilhelmine took over as the owner of Circus Dannebrog, with the assistance of her two eldest sons. In 1922 when Wilhelmine then passed away, Peter and Georg took over, until 1930 where the ownership was transferred to Dorthea and her husband Louis Steckel. Dorthea and Louis changed the name of the circus to Circus Reinsch, but unfortunately they were only able to run their business for one season.

From 1930 to 1977 there came a few other circuses named Circus Dannebrog, but none of them with involvement of the Enoch family, and none who survived more than a season.

The family dream of owning a circus survived though, and in 1977 Haddy Enoch and his wife Solveig re-established Circus Dannebrog. Haddy Enoch's father was Haddie Enoch - son of Theodore and Wilhelmine's daughter Louise.

Haddy and his wife Solveig had travelled and performed around the world as bicycle artists for a number of years with an act called '2 Haddies'. They have four children; Dennie, Agnete Louise, Isabella and Katja, who grew up in the circus, and who are all talented artists, together known as 'The 4 Haddies'.

The first years were very hard for the circus, but today Circus Dannebrog is one of the third biggest circuses in Denmark, and calls itself '*The National Circus of Denmark*'.

Dennie (who for many years did a bicycle act called 'Haddies Jr.') and Agnete Louise (Ring Mistress, press agent and since 2010 general manager) have been working in the circus since the beginning in 1977. Their two other sisters Isabella and Katja have worked there on and off as they have also been part of other international circuses, touring especially in Germany, just as all of the siblings children are also occasionally part of the Circus Dannebrog performances.

2.3.4 Part Conclusion

What can be concluded from the previous, is that the Danish circus industry as a whole, has largely been dominated and driven forward by three very influential circus families; the Benneweis', the Berdino's and the Enoch's. The Schumann family must be mentioned too though, although their focus has been more international the later years.

The Danish branch of the Schumann circus family, derives from Gotthold Schumann (1825-1898); the world famous German circus director, who first visited Copenhagen in 1871. The Danish Circus Schumann had a permanent summer show in Cirkusbygningen in Copenhagen up until 1969, and was particularly known throughout the world for their horse numbers of such high standard that it became internationally known as '*Schumannship*'. In the 1970's and 1980's the circus toured in Denmark, but for the past almost thirty years, the family members have each individually been working in various international circuses including the very prestigious Circus Big Apple.

In short, three important factors can be taken away from the historic introduction to the Danish circuses; *talent*, *tradition* and '*the good story*'. As mentioned on the previous pages, the Danish circuses are made up of exciting, compelling, and almost fairytale-like family stories, which are still living on today. And because these families and their family businesses have been such a big part of Danish (summer) culture for more than a century, they have become part of many Danish families' (summer) traditions. The reason why they have been able to live on for so long, is primarily due to the talent development within the circus families, and the fact that the performing artists have literally grown up in circus, which gives them a unique understanding of their crafts, the animals, the audience and the dynamics of the circus world.

In the following chapters the three keywords will come into play several times, but first the thesis will dwell a bit more on how circus is defined, as briefly introduced with the division between 'traditional' and 'contemporary' circus.

3.0 Defining Circus

Having now talked about the historic background for the Danish circus industry, the thesis will dwell a bit more on the distinction between the two branches of circus discussed: *traditional circus* and *contemporary circus*.

Tomi Purovaara, the director of CIRKO Center in Helsinki has written the introductory chapter in the 2012 publishing 'An Introduction to Contemporary Circus' in which he defines circus as: "*an organized performance of animals and highly skilled performers who perform in a ring surrounded by an audience.*"¹⁰ Other circus literature, dictionaries and encyclopedias all agree; The Oxford Dictionary for instance write: "*Circus ('sə:kəs) noun: A travelling company of acrobats, clowns, and other entertainers which gives public performances, typically in a large tent, in a series of different places.*"¹¹

The definitions all have main focus on the form of the performance (*travelling show, performed in a ring/tent, organized performance*), and less on the specific types of acts you find in a circus, as this part differs a lot (*animals/no animals, clowns/no clowns* and so on). As mentioned in the historic introduction, the concept of contemporary circus dates back to around the 1970s, and has since become a very large part of the circus industry worldwide, with the biggest player being the Canadian Cirque du Soleil, which was founded in Quebec in 1984.¹²

But what sets the two branches of circus apart?

In the article 'From Traditional to Contemporary Circus towards a Definition of 'Postcircus'' the author, a Serbian culture journalist named Ana Tasic i.e. states: "*Although based on traditional circus, new/contemporary circus is a lot more complex and self-confident, and behaves rather subversively towards its own traditions. It is a hybrid form with elements of acrobatics, dance, dramatic theatre, shadow theatre, and marionette theatre that also incorporates contemporary visual arts and digital technologies.*"¹³

¹⁰ Tomi Purovaara, 'The Definition of Circus', in An Introduction to Contemporary Circus (New Nordic Circus Network, 2012), p. 73.

¹¹ <http://www.oxforddictionaries.com/definition/english/circus>

¹² <http://theculturetrip.com/north-america/canada/quebec/articles/cirque-du-soleil-the-circus-that-took-over-the-world/>

¹³ Academic article: http://unpackthearts.eu/frontend/files/userfiles/files/Unpack_AnaTasic_Eng.pdf

There are no animals in contemporary circus, and no clowns. Focus is solely on the human body, and the acts are bound together by a story or theme, which invites for reflection.

“(...)the performer’s body has, naturally, always been the focal point of circus, but it is only reflected upon in the context of contemporary circus – a shift that can be partly attributed to the changing attitudes of society and the influence this has had on contemporary art. In contemporary circus performances like Face Nord and Tragédie Grecque the performer’s body is simultaneously a subject and an object of expression. It is phenomenological and discursive, material and semiotic, a signifier and signified; the work is produced from within the material of the performer’s own existence.”¹⁴

It is very telling that traditional circus performers wish to *show* their performances, while the contemporary performers wish to *be* their performances. This also goes hand in hand with the fact that traditional circus is very much based on the creation of a spectacle with the main goal of entertaining the audience and get their applause and reaction. In doing so, the performers use a lot of facial expressions, smiles, and often try to make the audience laugh, whereas contemporary circus don’t promise any fun or fireworks; the performers here are more serious, as their intention is to truly test the limits of their bodies, which require 100% concentration and focus.

A last important distinction worth mentioning here, is the attitude towards failure. In traditional circus failure is almost taboo. Acrobats, line dancers, animal trainers etc. are not allowed to make mistakes, as mistakes will destroy the illusion – the world of magic – and hence kill the essence of the show. In contemporary circus things are different. Here they are in fact playing with the possibility of failure; deliberately making mistakes to provoke the audience and stimulate it to think about the relation between traditional and new, between what is acted and what is really experienced. *“The superhero and his vulnerability”* as Ana Tasic explains...¹⁵

From Traditional to Contemporary Circus towards a Definition of ‘Postcircus’ A comparative analysis of performances by La Meute, Un loup pour l’homme, GLiMT and Subliminati Corporation presented at the Ny Cirkus Festival

¹⁴ ibid

¹⁵ ibid

The table below¹⁶ highlights the differences between traditional and contemporary circus by comparing the two branches against seven general parameters:

Table 1: Characteristics of Traditional vs. Contemporary Circus

	Traditional Circus:	Contemporary Circus:
Typically performed by:	Circus families	Conservatory trained artists
Typical staging format:	A ring-shaped arena set inside a tent; audience sit in tiered seating all the way around the ring.	Usually auditorium seating in front of indoor stage
Typical production format:	Series of spectacle-oriented acts guided through by a ringmaster	Series of theatrical, character-driven acts tied together by a central narrative or theme
Typical music:	Up-tempo marches, waltzes etc. (usually live orchestra) to underline 'spectacle'	A variety of genres (usually taped) - assists in dramatizing the show's themes, characters etc.
Typical types of acts:	Acrobats, animals, clowns, jugglers	Acrobats, contemporary dancers
Typical goal of artists:	To <i>show</i> their performances flawlessly – failure is taboo.	To <i>be</i> their performances – possible mistakes are incorporated...
Typical target group:	Families with younger children (family activity)	(Young) adults (date activity)

Author: Bradley Beswayan

Having the above in mind, there is no doubt that the Danish circuses described in the previous chapter indeed fall under the 'traditional' category. In the 'real world' the lines between the two branches are of course a little more blurred with. i.e. Circus Benneweis having a breakdance act and electronic music as part of their 2014 program – an interesting development which will be dealt more with in chapter 5 about strategy.

3.1 Flying Superkids as an Example of Contemporary Danish Circus:

Now, having mentioned the Danish show 'Flying Superkids' as a contemporary competitor to traditional Danish circus, I just want to finish off this section by elaborating on why I believe they fall into this category.

¹⁶ Inspired by a table on the Wikipedia page for contemporary circus: http://en.wikipedia.org/wiki/Contemporary_circus

Flying Superkids is a Danish show-ensemble that started as an untraditional gymnastics team back in 1967.¹⁷ Today, however, the show is much more than a gymnastics performance; it is a mixture of world class acrobatic acts performed by children and linked together with lighting, music, costumes, props and an overall theme¹⁸. Furthermore their summer tour is always performed in a tent...



...where the seating is auditorium-like:



In 2013 the tour was joined by Jimmy Enoch – member of the famous circus family behind Circus Dannebrog as described in chapter 2.3.3. He performs on stage with his world renowned bicycle act – bringing even more circus-wibe to the show. As of 2014 he has been one of three partners behind Flying Superkids owned by their new company Enoch Show Production, why the show has been even more influenced by circus in its most recent tour. There is no doubt that Flying Superkids is a contemporary show ensemble. It can be discussed whether it is contemporary gymnastics or contemporary circus and the truth probably lies somewhere in between. In this Thesis, I will regard it as contemporary circus though as argued in the above.

¹⁷ <http://flyingsuperkids.com/om-os/historie>

¹⁸ "Fold vingerne ud", "På spring" etc. <http://shop.flyingsuperkids.com/produkter/4-shop/>

4.0 Competitive Industry Analysis

When talking about the future survival of Danish circuses, we are talking about traditional Danish circuses as an *industry*. An industry which together with a variety of other entertainment industries make up the competitive landscape of the overall topic: *summer family activities*.

Present part of the Thesis will therefore be a competitive industry analysis, applying a nuanced selection of academic readings, models and case examples to get an as thorough understanding of the topic as possible.

4.1 Porter's Five Forces

The starting point will be Michael Porter's famous Five Forces model, which he first presented in his article: '*The Five Competitive Forces that Shape Strategy*' published in the Harvard Business Review in 2008 as an elaboration and further development of his original competitive forces article from 1979.¹⁹

4.1.1 Essence of 'the Five Competitive Forces That Shape Strategy'

Michael Porter's Five Forces analysis is a strategic tool to understand and address the existing competition in a given marketplace, and a framework that helps strategists, companies and other shareholders understand industry structure and the competitive situation within.

The essence of the strategy formulation is to cope with and understand the competition. Porter claims that the state of competition in an industry depends not only on one force; the direct competitors, but rather five forces. The five forces that make up the industry competition are: *the threat of new entrants, the bargaining power of suppliers, the bargaining power of buyers, the threat of substitutes*, and finally *the rivalry among existing competitors*. These five forces, Porter states, are the main profitability factors that drive industries in medium and long terms, and are therefore the most important, even though there are many sub forces that affect profitability in the short run.

¹⁹ <http://hbr.org/2008/01/the-five-competitive-forces-that-shape-strategy/ar/1>

The five forces model, which is illustrated in section 4.3, is designed so that there are three layers of vertical competition (new entrants, existing competitors, substitute products) and two horizontal competitive forces (bargaining power of suppliers and buyers). Before applying the model to the *summer-family-entertainment* industry which Danish circuses is part of, here is first a further introduction to each of the five forces and the dynamics, layers and characteristics they each represent.

4.1.2 The Five Forces Explained

4.1.2.1 The Threat of New Entrants:

New players that enter the game will bring new capacity and a desire to gain market share and thus put pressure on prices, costs, and rate of investments - capping the potential profits of the existing competitors. New entrants, in other words, have the power to change the entirety of the game, and this is why they are a valid threat worth taking seriously. How big the threat is can be determined by the height of the entry barriers and the existing competitor's reactions. If the entry barriers are low, the newcomers will expect little retaliation from the existing competitors. If the barriers are high, industry profitability is moderated, giving the existing players an advantage over the newcomer. The seven major types of entry barriers include²⁰:

- *Supply-side economies of scale.*
- *Demand-side benefits economies of scale*
- *Customer switching costs*
- *Capital requirements*
- *Incumbency advantages independent of size*
- *Unequal access to distribution channels*
- *Restrictive government policy*

These seven barriers are important to understanding how to hinder new entrants, but it is also important to distinguish and be aware that these barriers are not always able to only *hinder* new entrants, but also create *opportunities* for new entries i.e. new government policies that nullify existing barriers etc.

²⁰ 'The Five Competitive Forces that Shape Strategy' (2008)

4.1.2.2 Bargaining Power of Suppliers:

The power and value of a supplier is determined by its bargaining power, which Porter explains as the supplier's power to raise prices or reduce the quality of purchased goods and services, or by shifting costs to industry participants.²¹ The importance of each supplier group's power is determined by a number of characteristics of its market situation and the importance of its sales or purchases to the industry compared with its whole business.

A supplier group is powerful if²²:

- *It is more concentrated than the industry it sells to*
- *Supplier group does not depend heavily on the industry for its revenues*
- *Industry participants face switching costs in changing suppliers*
- *Suppliers offer products that are differentiated*
- *There is no substitute for what the supplier group provides*
- *The supplier group can credibly threaten to integrate forward into the industry*

4.1.2.3 Bargaining Power of Buyers:

Powerful customers are on the other side of the powerful suppliers. Here the customers can force down prices, and demand higher and better quality and service - thereby making each of the competitors play off against each other, all at the expense of industry profitability. The power of buyers is depended on how much pressure they put on the companies, which will also be affecting their sensitivity towards price changes. The companies will then have to take measures to reduce the power of each buyer by implementing loyalty programs etc.

According to Porter, a buyers group is powerful if²³:

- *There are few buyers and if each one purchases in larger volumes that are larger relative to the size of a single vendor. Large-volume buyers are powerful in industries with high fixed cost*

²¹ Ibid

²² Ibid

²³ ibid

- *The industry's products are standardized or undifferentiated*
- *Buyers face few switching costs in changing vendors*
- *Buyers can credibly threaten to integrate backward and produce the product themselves*
- *The product it purchases from industry represents a significant fraction of its cost structure or procurement budget*
- *The buyer group earns low profits, is strapped for cash, or is otherwise under pressure to trim its purchasing costs*
- *The quality of buyers' products or services is little affected by the industry's product*
- *The industry's product has little effect on the buyer's other costs*

4.1.2.4 Threat of substitute products or services:

The threat of buyers using substitute products or services will limit the potential of an industry. What is meant by substitute, is that a substitute performs the same and/or similar actions/functions as an existing product or service, but manageable in a better and/or easier way. For an example the traditional wired telephones are now being replaced by wireless smartphones, which are a better and improved way of handling the same functions of an old traditional telephone. Another example is plastic as a substitute for aluminum, for cheaper and easier use of production. Substitutes do not only limit profits here and now; they can also reduce the bonanza an industry can potentially reap in positive times.²⁴

The threat of substitute products is high if:²⁵

- *It offers an attractive price-performance trade-off to the industry's product. The better the relative value of the substitute, the tighter is the lid on an industry's profit potential*
- *The buyers cost of switching to the substitute is low*
- *Number of substitute products available in the market*
- *Substandard product*
- *Quality depreciation*

²⁴ Ibid

²⁵ ibid

4.1.2.5 Rivalry among Existing Competitors:

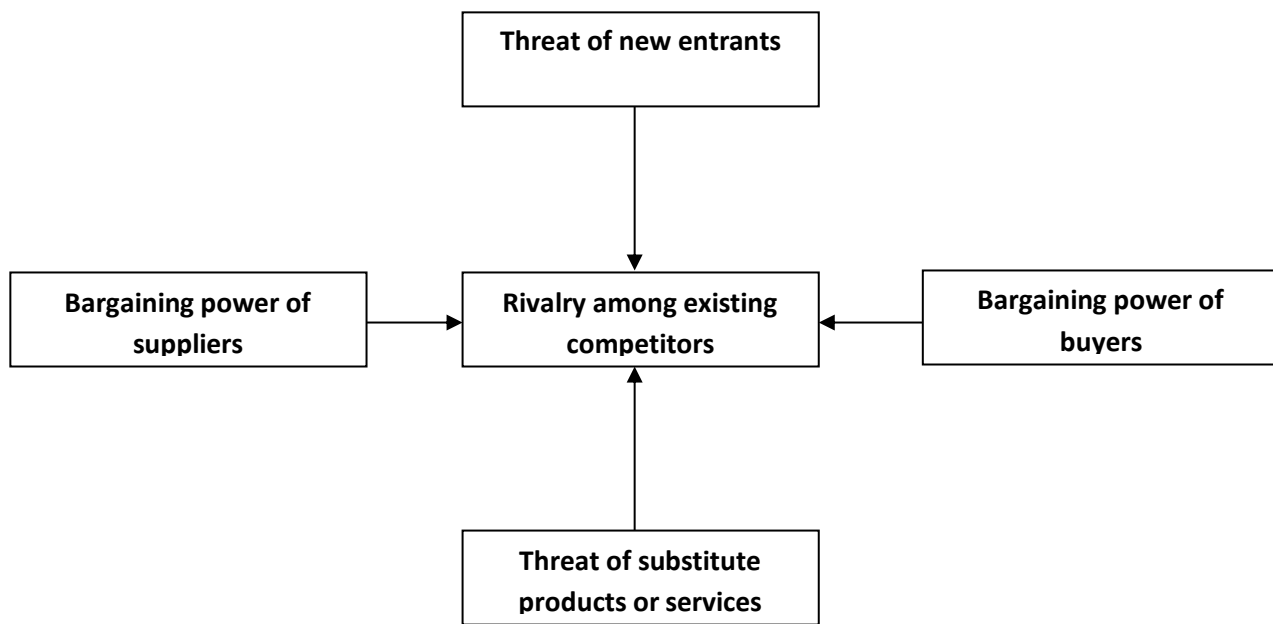
Competitive rivalry among the existing players in a given marketplace is made up by two main factors; the *intensity* with which the companies compete, as well as the *basis*, on which they compete. But if the existing rivalry amongst competitors comes from different forms of competitions, this includes price discounting and new product introductions, way of using advertisement, and changing service improvements.

The intensity of rivalry is greatest if:²⁶

- *Competitors are numerous or are roughly equal in size and power*
- *Industry growth is slow*
- *Exit barriers are high*
- *Rivals are highly committed to the business and have aspirations for leadership, especially if they have the set of skills and goals to reach beyond the economic performance in the industry*
- *Companies aren't able to read each other's signals because of lacking familiarity with one another, or diverse approaches of competing or differing goals*
- *The products or services are almost identical and they lack differentiation and they have few switching costs*
- *Fixed costs are high and marginal costs are low, creating the temptation to cut prices below their average costs even to their marginal costs*
- *Capacity is normally expanded in large increment to be efficient. The need for large capacity expansions, as in the polyvinyl chloride business, disrupts the industry's supply-demand balance and often leads to long periods of overcapacity and price cutting*
- *The product is perishable. Perishability creates a strong temptation to cut prices and sell products while it still has its value*

²⁶ Ibid

4.1.3 Applying Porter's Five Forces Model to the Circus Case:



Source: 'The Five Competitive Forces that Shape Strategy' by Michael Porter Harvard Business Review 2008

Having now presented the essence of Porter's thoughts, it is time to apply them to the present case of the forces and rivalry affecting the 'summer family activity' sphere in Denmark.

Threat of new entrants: The factors that speak in favor of low entry barriers and thereby a strong and valid threat of new entrants entering into the market are:

- The fact that Denmark is one of the fastest and easiest countries in the world to start up a new company in.²⁷ This is especially an advantage for small and medium sized creative and entertainment-based companies, who may not be strong – or have a strong interest in – the financial, economic and legislative rules of the game.
- Touring the country with an international contemporary show (like Cirque du Soleil, the Lion King musical, Disney on Ice etc.) is also easy and problem free, as there are many indoor arenas throughout the country for these specific purposes.

²⁷ <http://www.copcap.com/ExploreCopenhagen/Business%20climate>

High entry barriers:

- Large international traditional circuses will most likely not start touring around in Denmark (and thereby become direct competitors), as the legislative entry barriers here are quite high with regard to both keeping animals and renting the spaces to set up their circus tents.²⁸
- Other high entry barriers include the Danish language (foreign companies can't use standardized English/German/Spanish marketing-mix)...
- ...the high importance of the summer weather affecting ticket sales (and one never really knows with the Danish summers)
- The competition is strong with a lot of circuses, shows, theme parks, zoo's etc. already competing in the market place to attract the same target group

Threat of substitute products or services: There is no doubt that the threat of substitute services (shows/experiences/entertainment) is high in the summer-family-activity industry in Denmark. The number of substitute products to traditional circuses (zoo's, theme parks, 3D movies, contemporary shows) is very high compared to the number of potential buyers (781.000²⁹ families with children under 18 living in Denmark in 2014), and because Denmark is geographically such a small country, the density of the services is high as well.

This, as well as the fact that the overall price level of the various substitute services are very similar, means that the consumers costs of switching to a substitute is low – and this again makes the threat of substitutes high.

Another valid threat worth mentioning here is the development with more and more Danish families spending parts or all of their summer vacation abroad, making them just as likely to indulge in theme parks, water parks, zoos and circuses in the countries they are visiting, just as the technological development also possess a threat with its endless possibilities of creating entertaining content in completely new ways.

²⁸ Since 1962 it has i.e. been forbidden to have predators in circus (dyreværnsloven number 193 from 12.06 1962.) and in later years, the rules for how much space i.e. the elephants should have, have also changed, causing many Danish circuses to actually consider whether they are 'worth' continuing to have.

²⁹ <http://www.dst.dk/da/Statistik/emner/husstande-familier-boern/familier.aspx>

Bargaining power of suppliers: The traditional circus industry – as also mentioned in the definition chapter – relies heavily on quality star acts to carry their shows. Some are employed by the Danish circuses themselves, in which cases the circus is both the supplier and the buyer, but a big part of the acts are also rented from season to season by international circus companies and self-employed performers.

René Mønster, founder and director of Cirkus Baldoni explains: *“You buy artists and acts like you buy everything else. Each season we are sent a bunch of YouTube videos from artists and agents representing them – from all over the world, and we then take our picks and hire the ones we want.”*³⁰

The general state of the industry is that there are more acts than there are circuses, so in theoretical terms it means that the supplier group is less concentrated than the industry it sells to. The bargaining power is therefore largely in the hands of the circuses, although there are of course also certain threats.

- The threat of acts backing out last minute (happened with the elephant number Benneweis had hired for the 2014 season³¹)
- The high bargaining power of the most sought after quality acts
- The high differentiation between the various acts which again makes each of them more powerful in terms of bargaining position
- The threat that the star acts now have more industries to choose from, as for instance acrobats are also in high demand from the contemporary shows

The contemporary shows also have the advantage that they don't only need circus people, but also dancers, actors, mimes etc., so they risk less (have more power) as they have more supplier groups to choose from.

When the 'product' itself is human resources, the bond between buyer and supplier of course gets even more important than i.e. a cinema buying a certain blockbuster movie. Here it is not only about economic deals and relationship management but also about chemistry, culture, working conditions and values, and luckily Danish circuses in general have a good international reputation here, which works in their favor.

³⁰ Source: e-mail interview with René Mønster– see appendix 3

³¹ Source: phone interview with Dawid Benneweis – see appendix 1

Bargaining power of buyers: The bargaining power of the circus guests – the consumers/buyers - is a real Achilles heel. Here the power balance relies heavily on the importance of the product (a night in circus) to the buyer, the buyer's use of multiple sources (how many family activities in one summer), the general economic state of the buyers, as well as the switching costs from choosing i.e. a trip to the zoo instead.

As also mentioned earlier, there are so many summer family activities to choose from today. Just 40-50 years ago it was a highlight of the summer when circus came to town (high importance to buyer), but today it is seen as one of many offers. And although today's Danish families have more money to spend on leisure activities and entertainment than 50 years ago, their resources are still limited. With the recent financial crises, the amount of family activities purchased in one summer, has decreased, and as Agnete Enoch, Director of Circus Dannebrog explains, a trip to circus is one of the activities a lot of families have unfortunately chosen to cut away.³²

The power of the consumers is in other words everything. The entire circus industry depends on them, so the question now is how to get the Danish families to choose circus again.

Rivalry among Existing Competitors:

The rivalry within the Danish circus industry is very high due to a combination of the fact that the fixed costs for running a circus are increasingly high, leaving limited room to differentiate oneself on price. Furthermore the Directors of the circuses are passionate and committed to circus beyond imaginable as many of them was raised and grew up there. Add to that the fact that differences in size and power between the top 5 biggest circuses is rather close – and the history very long, and you have an intense competitive situation with strong rivalry.

But what about when talking about the Danish summer entertainment industry as a whole? Here many of the factors already mentioned again come into play. The geographical density of the activities and the consumers. The rather small market

³² See transcription of interview in Appendix 2

(compared to larger countries like i.e. Germany or Sweden) made up of Danish families + tourists. The fact that there are many players (see section 4.2), and their offerings are quite similar when talking about duration, price point and of course target group.

4.1.4 Conclusion of the Five Forces' Impact on the Danish Circus Industry

Based on the Five Forces analysis it can be concluded that the

- The market will most likely continue to be made up of more and more (international) contemporary shows and family entertainment, as the entry barriers for these types of organizations are low.
- There will, however, not likely come more traditional circuses into the mix, as the restricted rules and regulations regarding i.e. animals make the entry barriers high for this particular segment.
- The threat of substitute products is high. Both when talking directly competing summer entertainment activities (many players in dynamic market), but also when looking at the 'bigger picture' with the technological development where things like YouTube, Netflix and PlayStation have also become primary sources of entertainment for families. This will be dealt with more in chapter 5.0.
- The bargaining power of suppliers seems to depend heavily on the type of acts in question. Elephant numbers are scarce so they are very sought after and therefore have high bargaining power, but because there are SO many talented acts (jugglers, acrobats, magicians etc. etc.) trying to make a living off of their skills, the circuses usually have a lot of acts to choose from. Moreover, Danish circuses in general have a good reputation internationally, so they are able to attract world class acts.
- The consumers – in the other end of the value chain – hold a lot of power though. Especially in these years with the aftermath of the financial crises

still lurking, and families being more careful with spending their money. The tendency is that circus is just one of many summer family activities, and is no longer a yearly recurring tradition as it was just 1 or 2 generations ago. This is also something to be aware of when talking (new) strategy in chapter 5.0.

- Finally the four impacting forces together makes the rivalry among the competitors in the market high, and because Denmark is a rather small market with many players, the competition is fierce.

4.1.5 Criticism of Porter's Five Forces

Porter's Five Forces is a well-known strategic framework and planning tool, but one that has also been criticized quite a lot over the past decades from various sides and by various theoreticians and business practitioners.

The three main points of criticism this thesis takes into consideration are:

1. The criticism that the model presents a static view of the industry, when in today's business world most industries operate in dynamic market places.³³
2. In connection with the above; the criticism that the model assumes that uncertainty in the industry is low, allowing participants in a market to plan for and respond to competitive behavior.³⁴
3. The criticism that in today's economy many industry boundaries are blurring to such an extent that it becomes meaningless to even talk about industries.³⁵

I tend to agree with all three points, and especially think the last one is interesting when talking 'entertainment industry' as the lines between circus, theater, technology, dance etc. continues to blur and merge and evolve, making it difficult to draw the lines between them and categorize. Therefore the Five Forces analysis made in the previous is not meant to stand alone a fulfilling strategic tool, but rather as a

³³ Larry Downes in the article 'Beyond Porter' (1997)

³⁴ Kevin P. Coyne and Somu Subramaniam, "Bringing discipline to strategy" (1996)

³⁵ From the article 'Porter's Five Forces Revisited' by Steen Ehlers posted on <http://www.berg-marketing.dk/GIF/porterrev.pdf>

preparation – a way of starting a bigger competitive analysis, that *also* relies on models that take other things, including the critique points, into consideration.

Present competitive analysis will therefore now go on to analyzing and discussing a handful of other useful models including *market share distribution*, *industry life cycle*, *competitive risk evaluation*, *competitive value curve*, a *gap analysis*, the *Blue Ocean strategy* as well as a *SWOT-analysis* concluding on the entire chapter.

So in *this* context, where the Five Forces model is just one part of a bigger analysis, I think it is useful and helps shine light on some interesting issues to elaborate on and take notice of in the further work with making a (new) strategy.

4.2 Market share distribution:

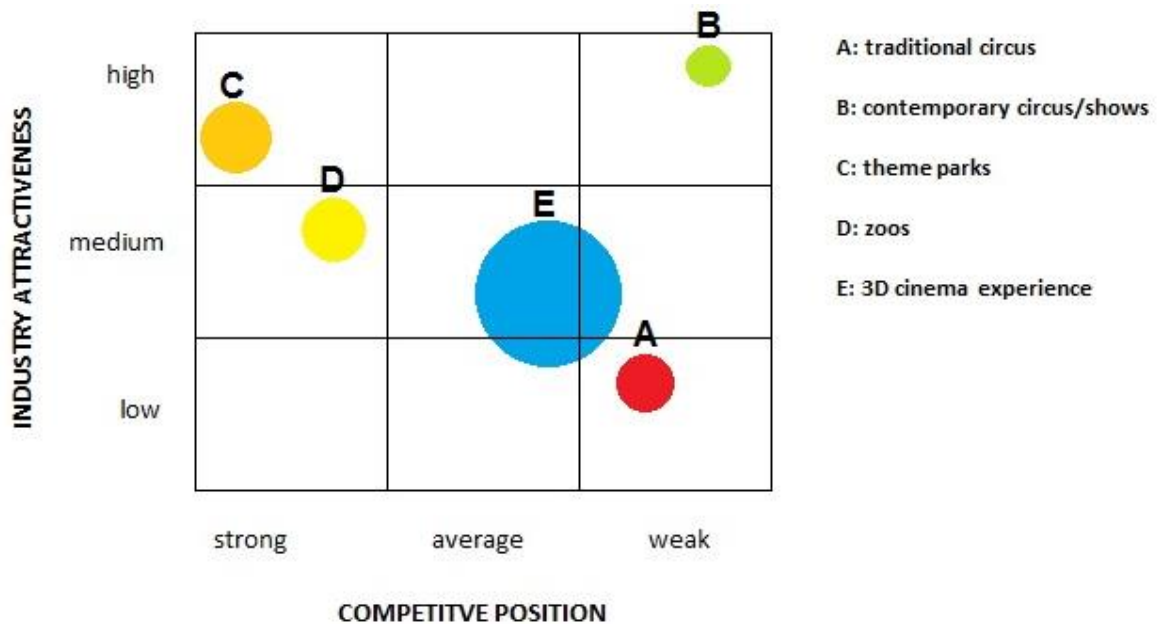
The market share distribution matrix on the following page has been developed with inspiration from De Wit & Meyer (2008). The various sub-industries within the ‘summer family activity’ spectrum have been grouped from A to E, and have been selected because they are all family friendly, fun (also for smaller children) and are fairly evenly priced. A 40 DKK entry fee to Sønderborg Slot, a 30 DKK trip to the indoor pool on rainy days or a whole week of summer camp etc. is therefore not represented here.

Each category has been plotted into the matrix based on two parameters: *industry attractiveness* and *competitive position*, and the data used to establish the size and position of each circle has been derived from secondary data including:

- Number of players in each field (size of circle)
- Visitors per year & revenue from ticket sales (competitive position)
- Industry attractiveness according to conclusions in Five Forces analysis

It has not been possible to get comparable numbers for all groups for the most recent year 2013/2014, so some numbers are from 2011/2012 as also indicated in the source material. This naturally impacts the accuracy of the conclusions drawn from the matrix, but I believe it still paints a clear picture of the market share tendencies within the industry as a whole, and gives a good indication of circus’ position within.

Figure: Market Share Distribution Matrix



Made by Bradley Beswayan, 2014

A: Traditional circus Group A, which has been the focal point for the paper so far, consists of 7 players represented by the Danish traditional circuses that have been touring the country this season. They are: Arena, Dannebrog, Benneweis, Baldoni, Arli, Krone and Mascot³⁶. Out of all the groups (A-E), this group has been the hardest obtaining valid numbers on revenue and visitors from, as the competition within the group is so fierce, forcing the circus organizations not to give too much information away.

Having done some research I have found out though, that the biggest player, Circus Arena, sells around 200,000 tickets a year³⁷ at an average price of DKK 256³⁸. This gives a revenue on ticket sales on around DKK 50 million.

³⁶ <http://www.cirkus-dk.dk/>

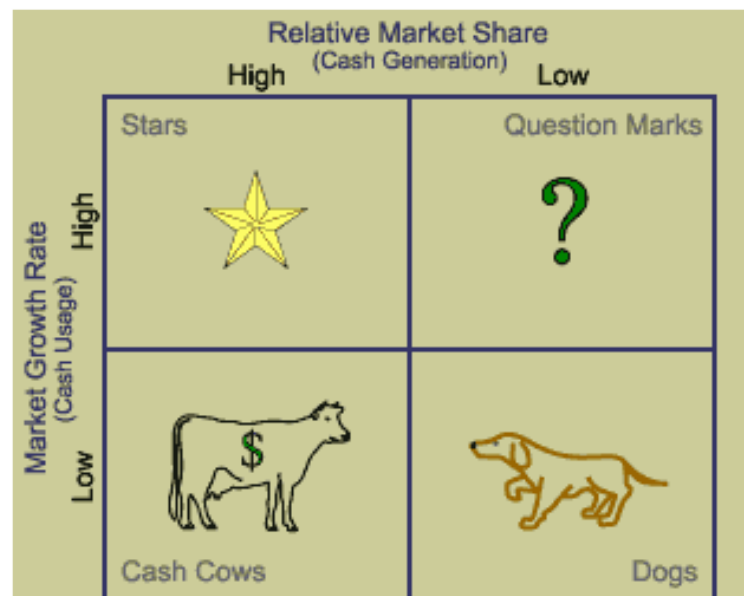
³⁷ "Til sammenligning anser Danmarks største cirkus, Arena, en sæson med 200.000-250.000 publikummer for at være en god sæson. Og mens Cirkus Summarum kun spiller i to byer og i fem uger, farer Arena land og rige rundt fra april til begyndelsen af september" Source: <http://www.b.dk/livsstil/hvad-skal-vi-med-savsmuld-og-telt-og-musik>

³⁸ www.arena.dk

When Circus Dannebrog has a good season they sell around 100,000 tickets according to www.business.dk³⁹, and with an average price per ticket of DKK 193⁴⁰ that is just under 20 million in revenue on ticket sales.

Circus Benneweis had a revenue of 11 million DKK in 2009,⁴¹ and is estimated to lie somewhere between 11-15 million today. With an average ticket price of DKK 242⁴² this gives a total of around 60,000 tickets. Hereto are circus Baldoni and the smaller circuses, which both have fewer guests and lower ticket prices. A total estimate of group A is therefore that the players together have around 400-450,000 thousand guests per year, and a combined revenue – on ticket sales alone – on around DKK 100 million. Revenue made from snacks, merchandise etc. is not part of the matrix.

The low industry attractiveness is primarily due to a saturated number of players in the market, negative/stagnating growth in ticket sales, enforced legislation in terms of renting circus venues and having large animals such as elephants; making it harder to be profitable. Bad publicity cases the past couple of years, as well as more public focus on animal welfare. If drawing a parallel to the well-known Boston Consulting Group Matrix⁴³ we can say that traditional circus as an industry in Denmark is mostly like dog, whereas the contemporary circus industry can be characterized as a question mark.



³⁹ <http://www.business.dk/raadgivning/rekordaar-for-cirkus>

⁴⁰ www.cirkusdannebrog.dk

⁴¹ <http://www.proff.dk/regnskab/cirkus-benneweis/dronningm%C3%B8lle/kultur-forlystelser-og-sport/13380232-1/>

⁴² www.benneweis.dk

⁴³ <http://www.netmba.com/strategy/matrix/bcg/>

B: Contemporary circus/shows

Cirkus Summarum sold 91,000 tickets in 2013⁴⁴ with an average price of DKK 250, making their total tickets sale revenue approximately DKK 22,750,000. Hereto comes the sale of snacks, merchandise etc.

Flying Superkids, which I also defined as a contemporary circus show back in chapter 3.0 sold 23,000 tickets on their 2014 summer tour⁴⁵. At DKK 190 a piece this gives a revenue of 4,370,000 on tickets alone (*Flying Superkids* sell a lot of DVD's etc. as well), and hereto must also be added their indoor arena shows throughout the rest of the year. In 2014 they have 17 indoor shows⁴⁶, and because they are already all sold out, their total ticket sales revenue for 2014 is estimated to be more likely around DKK 6 million.⁴⁷

Zirkus Nemo (contemporary circus for adult audience mostly) has a ticket price of approximately DKK 400, and in 2014 45,000 guests bought a ticket⁴⁸. This gives combined ticket sales revenue of approximately DKK 18 million. Again, refreshments and merchandise is left out of the picture as these numbers have been extremely hard to obtain, and makes it more difficult to compare the various groups in the matrix.

Together with a number of smaller contemporary circus shows, Group B has a total ticket sales revenue on just around 50 million DKK, which still makes its overall market share low. Because of the high growth within the segment and the profitability that comes with eliminating the animals, altering the target group and thus heightening the prices, the industry attractiveness is high and holds a lot of potential.

C: Theme parks The 10 biggest theme parks in Denmark are all member of Foreningen af Forlystelsesparker i Danmark. The members are: *Tivoli*, *Dyrehavsbakken*, *Djurs Sommerland*, *Universe*, *Fårup Sommerland*, *Legoland*,

⁴⁴ http://www.dr.dk/Om_DR/Nyt+fra+DR/artikler/2013/08/133712.htm

⁴⁵ <http://flyingsuperkids.com/dk>

⁴⁶ 14 + 3 christmas shows Source: *ibid*

⁴⁷ Number based on the estimate that each of the 17 sold out shows has room for approximately 500 guests

⁴⁸ <http://www.zirkus-nemo.dk/#3>

Tivoli Friheden, Jesperhus Blomsterpark, Bonbon-Land and Sommerland Sjælland, and together with a handful of smaller theme parks, they constitute group C.

In 2011 the group together had 10,8 million visitors (with Tivoli as the top scorer), and had a total revenue of just over 2,6 billion DKK⁴⁹. Now, in order to compare this group with the other groups for the purpose of the matrix, we will simply look at the revenue gained from the ticket sales, as total revenue numbers are not available for i.e group D and E. When looking at the ticket prices (or tour passes for those with free entry) on the top 10 theme parks in DK, the average price is DKK 220, making the ticket sales revenue alone approximately 2,3 billion DKK.⁵⁰

There is no doubt that group C is the clear market leader here, and as not only family activities for Danish families but also massive tourist magnets (Tivoli, Legoland etc.), the industry attractiveness remains high – especially for themes that are well-known by the children from TV, games etc. and incorporate digital innovation and interaction, which is a major global trend these years.⁵¹

D: Zoos The seven biggest players in group D are *København Zoo, Odense Zoo, Givskud Zoo, Knuthenborg Safaripark, Aalborg Zoo, Ree Safaripark* and *Randers Regnskov*. In 2012 they together had 4,4 million visitors⁵². The average ticket price from all the players, and with the average of an adult and a children ticket, is DKK 130⁵³, which gives an annual revenue of private ticket sales on approximately DKK 572 million. Hereto comes food and beverages bought during the stay, as well as souvenirs etc., just as a big part of a zoo's overall revenue comes from business events etc. This revenue is not included here.

The last couple of years the zoo segment in Denmark has experienced growth – especially due to the fact that the zoos have almost all invested heavily in improving the facilities for the animals and making their environments more true to their natural habitats.

⁴⁹ [http://forlystelsesparker.org/da-](http://forlystelsesparker.org/da-DK/Presse/~media/Filer/Campaign/FFD/2013uploads/FFDN%C3%B8gletal2010_11.ashx)

[DK/Presse/~media/Filer/Campaign/FFD/2013uploads/FFDN%C3%B8gletal2010_11.ashx](http://forlystelsesparker.org/da-DK/Presse/~media/Filer/Campaign/FFD/2013uploads/FFDN%C3%B8gletal2010_11.ashx)

⁵⁰ Average prices found by comparing price charts on the websites of 10 biggest players in the group.

⁵¹ <http://www.reuters.com/article/2014/06/04/research-and-markets-idUSnBw046254a+100+BSW20140604>

⁵² Nuber found via Danmarks Statistik, and article on finans.tv2.dk, or by adding up the numbers from the financial reports published on each of the zoos' websites. They all add up to 4,4 million.

⁵³ Source: price information listed on the various zoo websites

E: 3D cinema experience In 2013 there were 162 cinemas in Denmark, with a total of 416 cinema auditoriums⁵⁴. Back in 2009 when the famous 3D movie Avatar premiered in Denmark, 21 Danish cinemas was able to show the movie in 3D.⁵⁵ Towards the end of the year 34 more cinemas had ordered the new technology⁵⁶ and today almost all Danish cinemas have bought the technology.

Danish cinemas had total revenue of DKK 858 million in 2013⁵⁷ of which a big part came from selling commercials to be viewed before a movie starts. The actual number of movie tickets sold was 12,866,000⁵⁸, and The Danish Film Institute estimate that approximately 20% of these were tickets to 3D movies – so roughly 2,5 million.⁵⁹ With an average ticket price of DKK 100 this gives a revenue of DKK 250 million from 3D ticket sales alone – and hereto comes popcorn, soda etc.

Of all the groups, the 3D cinema group has the most players and therefore also the largest circle in the matrix. However, because the Danish population is actually not as impressed with watching movies in 3D⁶⁰, the industry attractiveness has declined some over the past years. It also plays an important role for the industry attractiveness that the players in the field – the cinema owners – are relying so heavily on whether it is a good or bad ‘movie year’, so the insecurity is quite high.

3D is still very popular with animated movies/cartoons and superhero movies though (the kind of movies that are *made* for 3D), which are most likely to be watched by our target group in question. So this speaks in favor for an attractive market position, along with the fact that the many players offering this experience make the availability and accessibility high for the consumers – thus making the decision easier and more impulse-driven.

The figure on the next page shows the positions of groups A-E based on the numbers explained here in the previous, which has been used to determine their competitive positions in the market share distribution matrix.

⁵⁴*biografsale. Source <http://www.statistikbanken.dk/statbank5a/SelectVarVal/saveselections.asp>

⁵⁵ <http://ing.dk/artikel/sadan-far-avatar-3d-effekter-i-de-danske-biografer-105198>

⁵⁶ Ibid

⁵⁷ <http://danske-biografer.dk/danskerne-ser-stadig-film-i-biografen/>

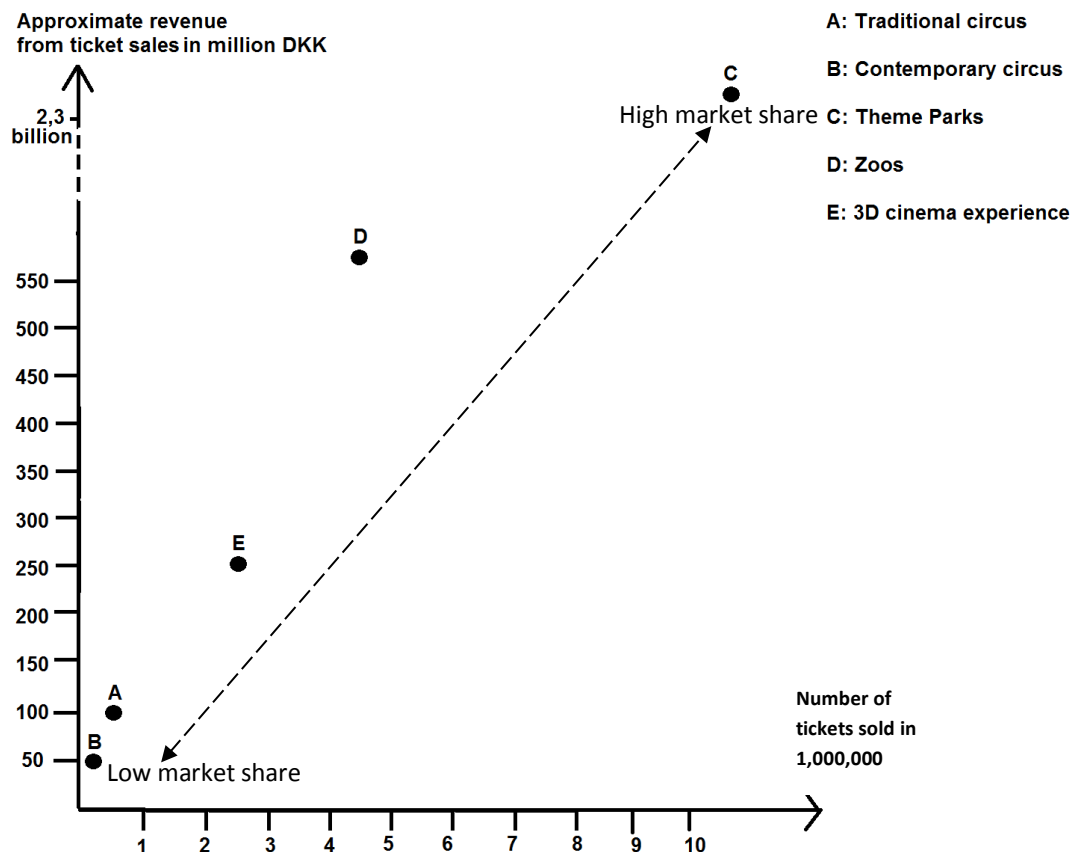
⁵⁸ <http://www.dst.dk/da/Statistik/emner/film-boeger-og-medier/biografer-og-film>

⁵⁹ "Siden biografpremierne i 2009 på animationsfilmene "Avatar" og Pixars "Op", har salget af 3D-billetter i biograferne landet over været stødt faldende. Det Danske Filminstitut anslår, at andelen af solgte 3D-billetter udgør cirka 20% af det samlede billetsalg landet over i dag." Source:

<http://navisen.dk/blog/film-skal-ses-uden-3d-briller/>

⁶⁰ ibid

4.2.1 Figure illustrating research data:



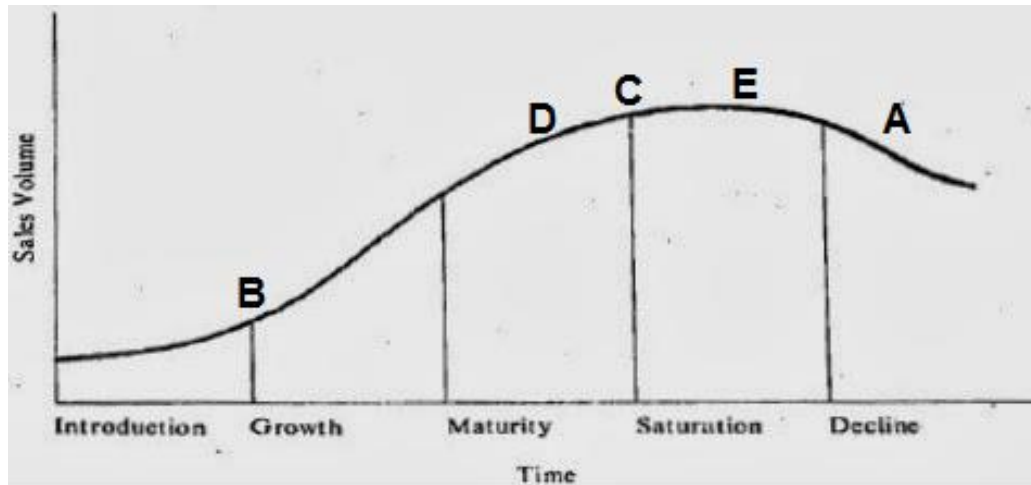
Made by Bradley Beswayan, 2014

4.3 Industry Life Cycle

Another way of illustrating the above is by looking at where the five groups each are placed in their industry life cycle – a model introduced by Michael Porter.

What is particularly interesting to look at here, is of course group A and B – traditional Danish circus versus contemporary circus, because although traditional circus still sell more tickets overall, they are an ‘old’ industry in decline, whereas contemporary circus is a new and growing industry.

The growth of group B started with the success of Cirque du Solei, who chose to pursue a Blue Ocean Strategy, which I will get back to in section 4.6.1. First though, let us go on to make a value curve evaluation of our five groups in order to identify the gaps and possibilities Danish traditional circuses may pursue in the seasons to come in order to survive as an industry and start selling more tickets again.



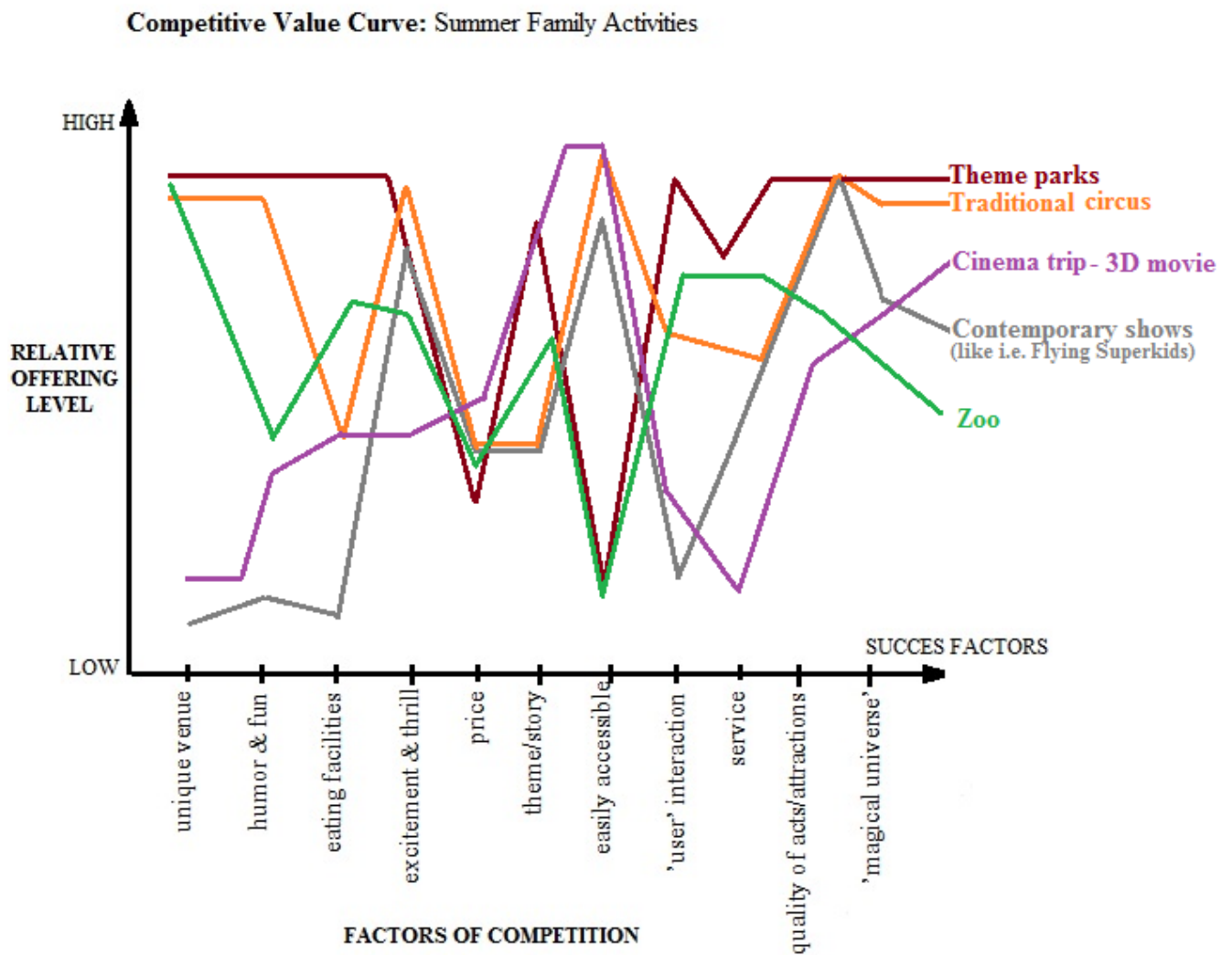
4.4 Competitive Value Curve Evaluation

Having now been through some of the more 'classical' competitive analyses models, it is time to also think outside the box a little. By now we have established that traditional Danish circuses are having a hard time as an industry with stagnating/declining growth and low market shares compared to the other types of family entertainment activities they are up against.

But apart from the macro environmental factors already discussed (economy, legislation, technology etc.) what might be the reason for this? Where do the traditional Danish circuses perform worse than their industry competitors? And are there any gaps in the market that could present new opportunities?

To get a closer understanding of this, this chapter relies on the thoughts from the article '*Charting Your Company's Future*' by W. Chan Kim and Renée Mauborgne, which was published in The Harvard Business Review in June 2002.

For the article the two authors have made a model; *the competitive value curve*, where they measure various companies/industries against a number of competitive factors and how successful they each are against each of the parameters. The below model is my attempt to do the same with the summer family activities we have been working with in the chapter so far.



Made by Bradley Beswayan, 2014

The model has been filled out based on facts (venue, accessibility, user interaction etc.), as well as from the answers of the respondents in my questionnaire survey ('no healthy food options in circus', price is 'okay' etc.⁶¹).

4.5 Gap Analysis:

The traditional Danish circus industry scores low on '**eating facilities**' (i.e. no healthy options), '**price**' and '**theme/story**' as there is no real connection between the different acts. '**User interaction**' and '**service**' is rated medium high.

⁶¹ See questionnaire in Appendix 5 and read more about the conclusions in chapter 5 and 6.

The biggest strengths are **‘the unique venue’** (the circus tent), that circus is **‘easily accessible’** (it comes to you!) and there is a good combination of **fun, thrill and magic** in the **high quality** acts.

These strengths play an important role in the SWOT analysis presented in the end of this chapter, which will form the basis of the new strategy formulation discussed in chapter 5.0.

Regarding the weaknesses/gaps, the circus industry is very clear (and standing together) on the fact that they will not lower the ticket prices. They simply can't afford to, in the light of the last seasons' rise in the expenses connected with touring the country, renting the spaces to set up the tents, higher gas and electricity prices etc.

The question is therefore ***how to give the circus guests more value for their money?***

- Could they do something to elongate the circus experience? More activities before and after show + in breaks? Something to do as a family afterwards when they come home to talk about their experience?
- Could the Danish circuses perhaps expand the show areas *outside* the circus tent with more food trucks etc., places to sit and eat (better eating facilities?)
- And should the traditional circuses try to make their shows more cohesive with a real ‘theme’ or more focus on an actual story? The circus family stories that hold so much magic, drama and authenticity in themselves?

All this will be discussed more in chapter 5.0, but when it comes down to it, it is all about standing out from their industry competitors. About divergence, thinking outside the box and finding the right balance between traditional roots and innovation. As mentioned before, contemporary circus did just this by applying a Blue Ocean Strategy, and maybe traditional circus can learn from their example without copying them and doing the same, but by finding back to their own niche?

4.6 Using 'Blue Ocean' Thoughts to Think Outside the Box:

In business terminology the term 'Blue Ocean' is used to describe (unknown) markets untainted by competition. A Blue Ocean denotes all industries not in existence today, and happens when demand is created instead of being fought over (Red Ocean). Put simply, a blue ocean strategy involves an opportunity for growth that can be both profitable and quick if the right 'gap' in the market is identified.

There are two ways of explaining the creation of a blue ocean strategy. 1) A company can give rise to new industry or 2) It can rise and be created within a red ocean strategy, when a company alters the boundaries of an existing industry.⁶²

The authors behind the concept of Blue Ocean, Chan Kim and Renée Mauborgne first published an article about this new way of thinking strategy in 2005. Their article was called '*Blue Ocean Strategy: How to Create Uncontested Market Space and Make the Competition Irrelevant*'. The basis of the article is extensive research on the creation of new markets and industries, which they conclude are all based on a consistent pattern they call blue ocean strategy thinking.

Blue ocean strategy is all about finding new markets or developing new markets where there is no competition. Imagine the term "Ocean" in Blue Ocean - the creation of something in a place where there won't be anyone trying to divide or conquer the creation made. Advantage of creating blue ocean strategy is how powerful it can become; a blue ocean strategy move can create brand equity that lasts for decades. *"The creation of blue ocean strategy comes with a very important feature and that is that this strategy rejects the fundamental tenet of conventional strategy: that a tradeoff exists between value and cost. Companies can either create greater value for their costumers at a higher cost or create a reasonable value at a lower cost. More or less this is a choice of differentiation and low cost"*⁶³.

Creation of blue ocean strategy shows that successful companies pursue differentiation and low cost at the same time. If we look at Cirque du Soleil as an example of blue ocean strategy implemented on this company, they created a new

⁶² De Wit and Meyer (2010)

⁶³ ibid

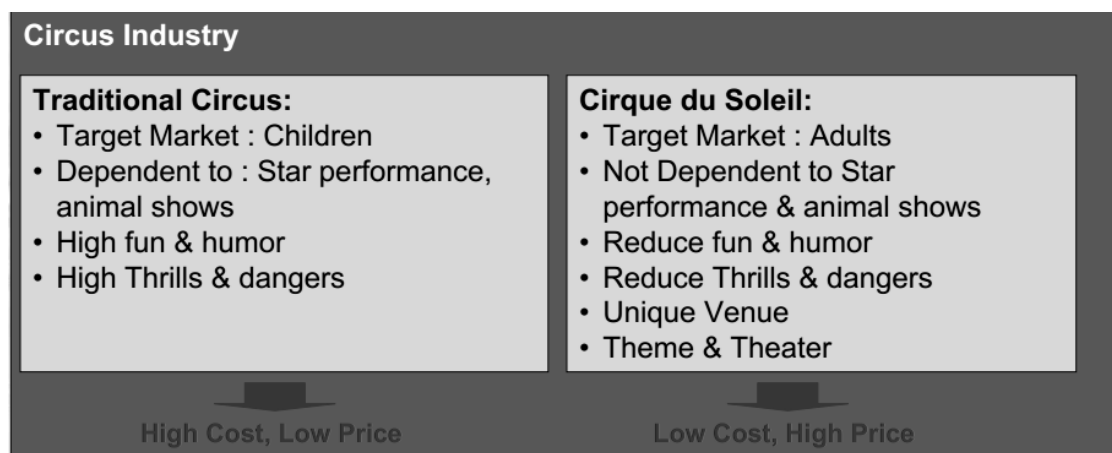
market space by combining opera and ballet with the circus format while they eliminated the focus on star performers and animals.

4.6.1 Learning from the Cirque du Soleil Case:

The Cirque du Soleil example of Blue Ocean strategy is used widely across various industries and businesses, and is of course particularly relevant in present case concerning the circus industry, which Cirque du Soleil as a 'contemporary circus' is part of.

As mentioned in the *definition* chapter, Cirque du Soleil was one of the first contemporary shows to gain wide recognition and success. Instead of trying to compete with all the other traditional circuses (Red Ocean), they chose to look at things differently and pursue a low cost/high price alternative in an undiscovered Blue Ocean, as illustrated in the figure below:

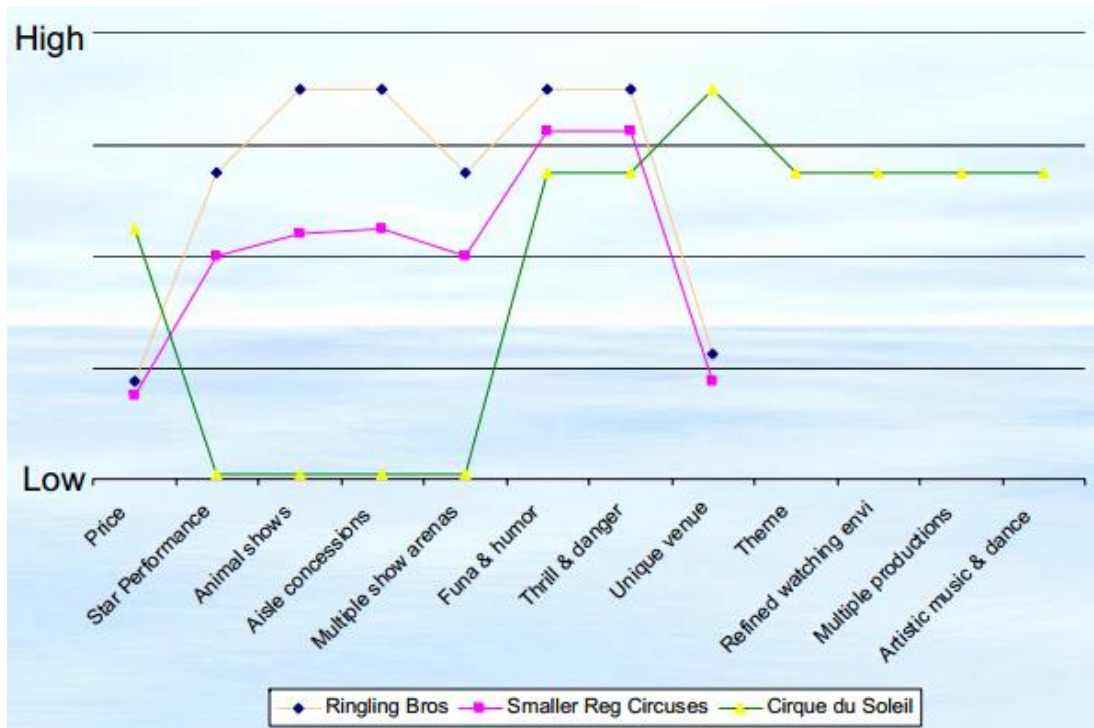
Cirque du Soleil Blue Ocean case:



Source:<http://www.eurasiapoint.com/wp-content/uploads/2012/02/%C4%B0nov-110616de-Blue-Ocean-Strategy.pdf>

In short, what they did was change their target group, eliminate the animals, clowns and star performers, and instead make the show more cohesive by adding a story/theme and by making the whole thing more exclusive (like going to the theater etc.) by booking indoor venues, setting the prices higher and updating the music to change the *feel* of the whole thing.

Compared to their biggest competitors they were able to find a whole new place for themselves – untainted by their competitors, as shown in this table:



Source: <http://www.eurasiapoint.com/wp-content/uploads/2012/02/%C4%B0nov-110616de-Blue-Ocean-Strategy.pdf>

Now, I am not suggesting that the traditional Danish circuses go out and do the same, because what Cirque du Soleil did, has now in itself become a new (sub)industry; *contemporary circus*, as defined in the introduction. And although an industry in growth, the competition here is now fierce as well, and has become a Red Ocean.

What they *can* do, however, is be inspired by the 'outside-the-box' way of thinking strategy. To take a realistic view on what their strengths and opportunities are and then focus on them without being afraid to put all their eggs in one basket so to speak.

The SWOT analysis on the next page sums up these strengths and opportunities along with the weaknesses and threats also talked about in the Thesis so far, and as mentioned this will form the basis of the strategy creation process dealt with in chapter 5.0, which will hopefully make Danish traditional circus better equipped to survive as an industry in the (near) future.

4.7 SWOT Analysis for the Traditional Danish Circus industry anno 2014:

STRENGTHS:	WEAKNESSES:
<ul style="list-style-type: none"> -The circus tent as a unique venue -Accessibility/closeness – ‘we come to you’ (limits transportation costs + saves precious family time + can be impulsive decision) -Strong history/story -The circus family ‘brands’ -Fun, thrill and magic in one experience! -Strong –nostalgic- relation to decision makers (parents or grandparents) - Audience opportunity to be very close to large and exotic animals. 	<ul style="list-style-type: none"> -Strong reliance on renting ‘star acts’ abroad -Not enough ‘value for money’ -The economic state of Danish circuses -Industry rivalry rather than unity (also in the press = bad publicity for all) -Declining/staggering ticket sales - Guests (and children) not as easily impressed by extraordinary acts today due to large exposure through media (TV talent shows, YouTube clips etc.).
OPPORTUNITIES:	THREATS:
<ul style="list-style-type: none"> -Elongating the circus experience (before/after actual show) → more value for money -Create more of a theme/ use story telling -Expand the venue outside the tent with more food trucks (healthy option), bouncy castles, petting zoo etc. -Rethinking value propositions -Industry collaborating on image campaign (the ‘founding families’ of Danish circuses) 	<ul style="list-style-type: none"> -Contemporary shows gaining market shares -Threat of stricter animal laws (elephants etc.) -Threat of being forgotten amongst all the other ‘summer family activity’ offers -Threat of higher rental prices/restrictions by municipalities -Threat of not being able to attract the right people to work in/run/manage the circuses (hereunder the threat of youngest generation not wishing to take over/be part of circus world)

5.0 DEVELOPING A NEW CORE STRATEGY

Where the previous chapters have laid out the groundwork for the current state of the Danish circus industry in general, this chapter digs a little deeper. The thesis is now no longer analyzing what Danish circus *is*, but rather discussing what it *should be* and *could be* in the (near) future.

It is a relevant strategic discussion, but with no 'right' answer. The findings in the SWOT analysis on the previous page represent a frame of strengths, weaknesses, opportunities and threats to navigate from, and together with my primary data collection, which consists of a questionnaire survey with 71 circus guests, as well as interviews with a handful of the most influential circus people in Denmark today, this will be the heart of the thesis.

The focus and main objective in this chapter is *knowledge creation* – the new knowledge that can be derived from the synergies of bringing all the above mentioned input together. To understand and listen to the needs, wishes and behavior of the circus guests (the consumers), and to share strategic thoughts on the challenges circus is facing between the various actors in today's circus industry.

In the 'real' world circus Benneweis, Dannebrog, Baldoni etc. are competitors, with each their own thoughts on how to best survive and thrive in the future. But right here, in present forum and for the purpose of strategizing to survive as an *industry* against their common industry threats (theme parks, zoo's etc.), they have generously agreed to share their input with and for each other and other interested parties reading this thesis.

'Synergy' is defined as the interaction of two or more agents or forces that combined create a greater effect than the sum of their individual effects⁶⁴, and hopefully the following will create just the synergy needed to help make the Danish circuses survive and thrive for many more years and generations to come.

⁶⁴ <http://www.thefreedictionary.com/synergy>

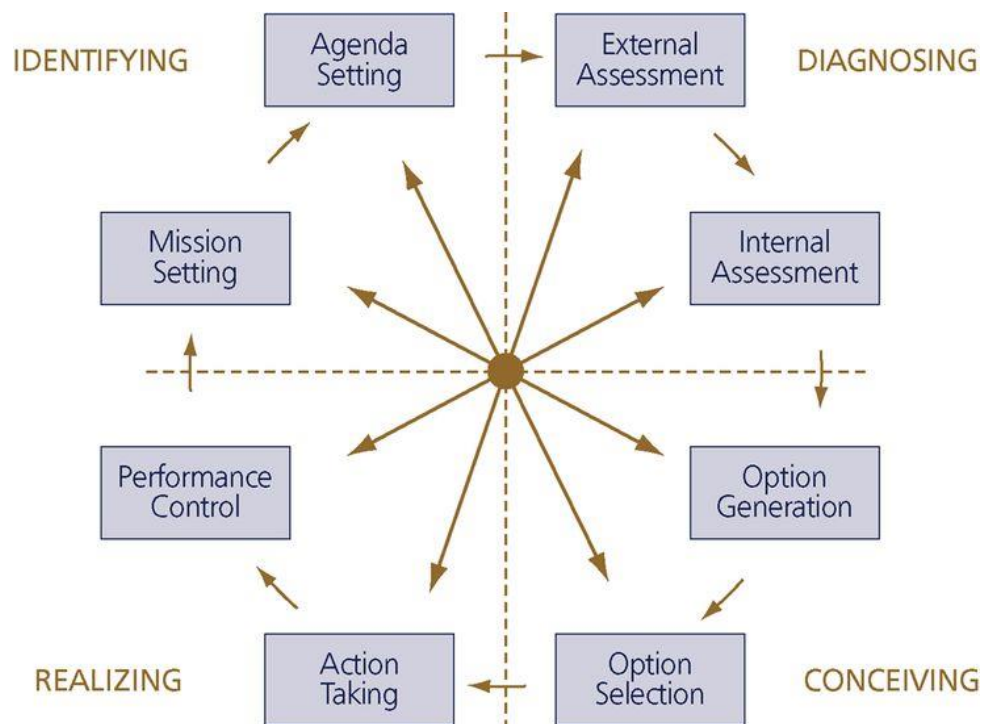
5.1 Theoretical Introduction to Strategy Formation

De Wit and Meyer (2010) define strategy as '*a course of action for achieving an organization's purpose*', and although there are many more – and different – definitions out there to this fluid phenomenon, the above seems covering in this case study.

The purpose of the traditional Danish circuses is to entertain Danish families by offering them a magical, fun and thrilling show in a unique location, at an affordable price, close to where they live. Now, in order to achieve this purpose, a strategy must be formed – in this case a new strategy that takes into account the internal and external factors discussed in the previous, as well as the thoughts, wishes and behavior of the consumers: the circus guests.

Before going on to discuss this process in practice and bring in the interviews, questionnaire results etc., let us first dwell a little on the theory behind strategy formation.

De Wit and Meyer (2010) argue that the process of strategic reasoning can be divided into four general categories – or stages - of activities; *identifying*, *diagnosing*, *conceiving* and *realizing* as illustrated in the model below⁶⁵:



⁶⁵ De Wit and Meyer (2010)

The first two stages – identifying and diagnosing – have already been covered in chapters 1.0 to 4.0 with i.e. the history, definition and analyses of the internal and external environment affecting the current state of traditional Danish Circus.

What we will focus on in present chapter is therefore the stages of *conceiving* and *realizing*.

5.1.2 The Conception Stage

The conception stage is all about coming up with solutions for the strategic problems the traditional circuses are facing. As also outlined in the SWOT analysis, I have identified the five main problems as being:

1. Declining ticket sales
2. The target group of today is less impressed by extraordinary acts due to large exposure through media (YouTube, Facebook, TV etc.)
3. The guests don't feel they get enough 'value for money'
4. The big wild animals, who used to draw in the crowds, become fewer and fewer due to restrictions, legislation and animal welfare debate
5. The economic state of the Danish circuses, who face more and more fixed costs, does not leave room for investing in the future

Now, a course of action must be found that will allow the industry to relate itself to its target group in such a way that it will be able to achieve its purpose.

Option generation:

Option generation is all about creating potential strategies. Managers can approach a specific strategy issue in two ways. They can immediately leap at one specific course of action, thus limiting their strategic option generation activities to only one prime candidate, *or* they explore a different number of avenues for approaching their strategic issue, thereby generating multiple strategic options. Each option can then be taken from a detailed general outline of actions to a full-blown strategic plan, with specifying goals, actions, tasks, responsibilities, resource allocation, milestones and performance measures.⁶⁶

⁶⁶ De Wit and Meyer (2010)

Option selection:

When two or more potential solutions/strategies have been generated, it is important to make a screening of the options to find out which one is the best choice for the organization. The managers have to choose the most attractive option, and this is done by evaluating them from different criteria involving perceived risk, anticipated benefits, and the organization's ability to carry out the strategy as well as how the competitors might react⁶⁷. In the real world this evaluation is usually based on experience and judgment calls as the managers usually already have the required inside knowledge. Once the screening has taken place a strategy is then selected.

5.1.3 The Realization Stage

The realization stage is like an 'action plan'. It is the realization that the problems identified can only be resolved if concrete actions are undertaken in accordance to the strategy conception. The actions are what will give results. *"Managers must make adjustments to their businesses or initiate actions in their market – they must not only think, talk and decide, but also do, to have a tangible impact"*.⁶⁸

When there is a clear pattern to the actions it is called a realized strategy, and when we talk about this, we distinguish between two types of activities; action taking and performance control:

Action taking:

Action taking is a potential problem solution that must be carried out to become a realized strategy solution. The organization's functioning includes all of the performed actions and hands-on activities - everything from setting up and operating a business system on a day to day basis.

⁶⁷ De Wit and Meyer (2010)

⁶⁸ *ibid*

Performance control:

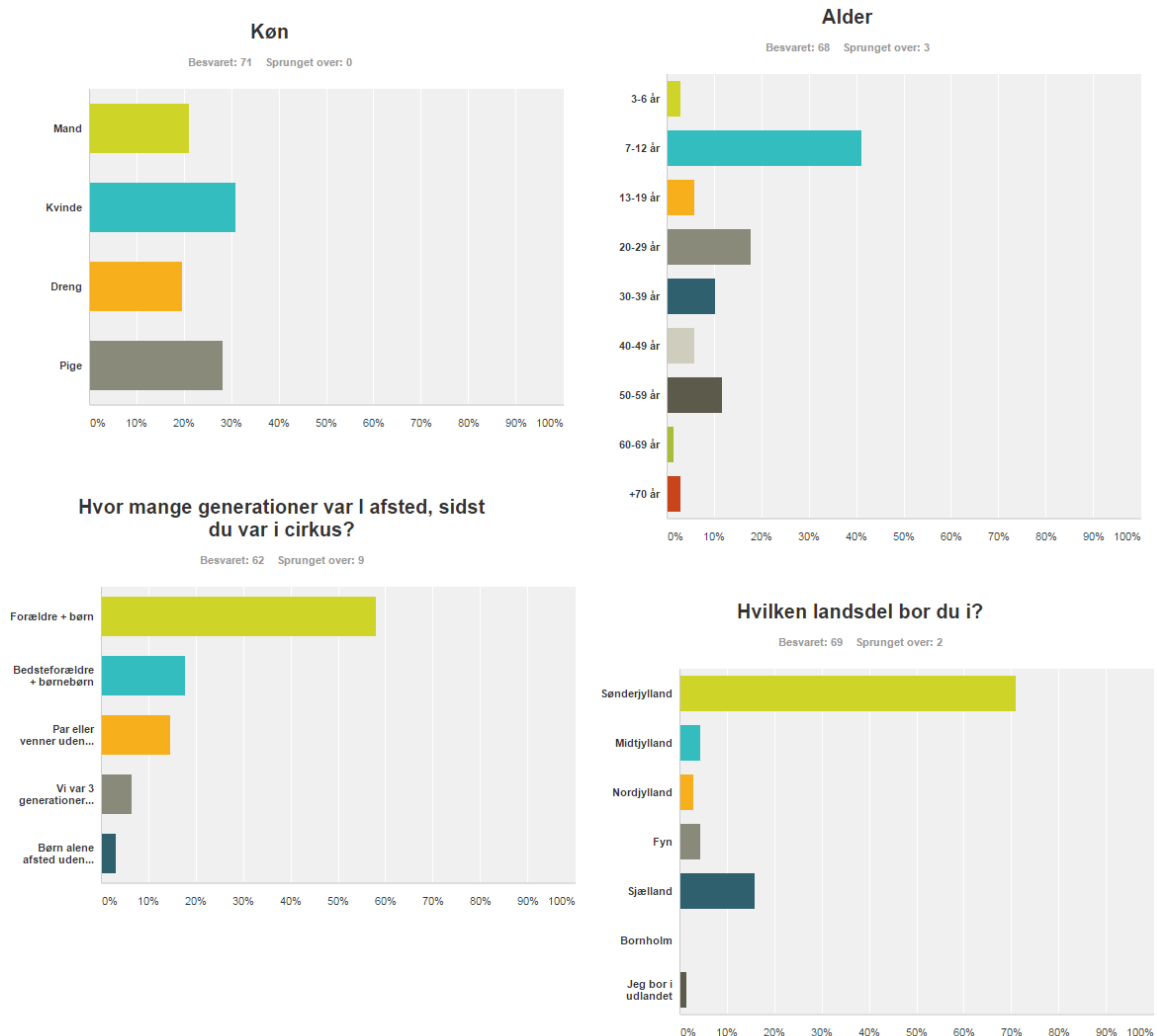
Managers must measure if the actions that are taken within the organization are connected to the strategy selected, and how the results are compared to what was expected. The reflection or the evaluation of the actions can happen unconsciously or informal, but it can also be formally structured into a performance monitoring system. This way the efforts of the employees and management can be measured. If necessary, corrective steps can be taken to ensure the organization stay in the intended course of action. However, deviation from the intended strategy can also be a signal to re-evaluate the original solution. When engaging in performance control it is important to determine, which performance indicators should be used. The indicators can be financial (quantitative), or qualitative such as customer satisfaction surveys, - and a combination of both can be a balance scorecard, as explained by Kaplan and Norton (2001).

Thinking about strategy formation this way is a deliberate approach, and we will now continue the process by talking about the conception stage in practice in relation to our case study.

5.2 What should be the Core of Traditional Danish Circuses in the Future?

Of the 5 strategic problems listed in section 5.1.2, the four first points are in many ways related. Roughly put we can say that the *declining ticket sales* are due to the fact that the circus guests don't feel they get enough *value for their money*, and two of the main reasons for this is that today's circus guests are *less impressed by extraordinary acts* than previous generations (who didn't have YouTube etc.), as well as the fact that there are *fewer big exotic animals* in Danish circuses of today. The last point, regarding the financial state of the Danish circuses will be dealt with more in a little while.

But if we start by concentrating on the four main weaknesses listed above, let us now try to take a look at what the circus guests have to say about circus of today:



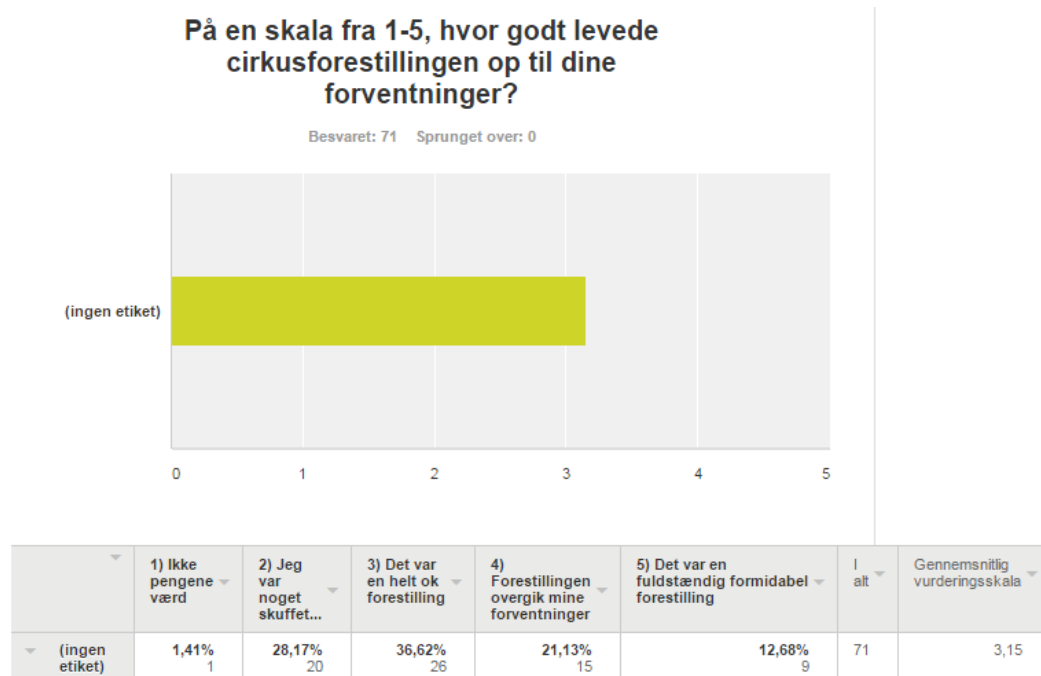
The diagrams on the previous page shows the demography of the 71 respondents of the survey, and as explained in the methodology section in the introduction, the survey is not a hundred percent representative of the general view of the target group, but rather an indication of the behaviors, emotions and reactions towards the traditional Danish circuses, from a part of the target group who has actually visited one or more of the Danish circuses in the past year.

An interesting fact from the lower left diagram is that the most common 'constellation' when visiting circus is for parents and children to go together. The second most common constellation is for grandparents and grandchildren to go together, but in only 6% of the cases three generations went together. Already here is

a big potential for extra ticket sales, by making a visit in circus a family tradition for the *whole family*.

Of the 71 respondents 58% had most recently visited circus Benneweis⁶⁹. 29% circus Arena, 12% circus Dannebrog and the rest was shared between circus Baldoni, circus Krone and circus Mascot.

Now, when talking about the feeling of getting value for one's money, and hopefully even coming back again next year, expectations versus the actual experience is key. The respondents, in this case, rates their experience with an average just over 3 on a scale from 1-5, so satisfying and what they expected – but not a lot more.



In other words this is also an area with room for improvement, and when reading the critique the anonymous respondents were allowed to share in the comment section, it is quite clear that what the consumers want *is* in fact *traditional* circus – but perhaps just served in a new way:

⁶⁹ The last circus to be 'in town' in Sønderborg at the time the survey was conducted

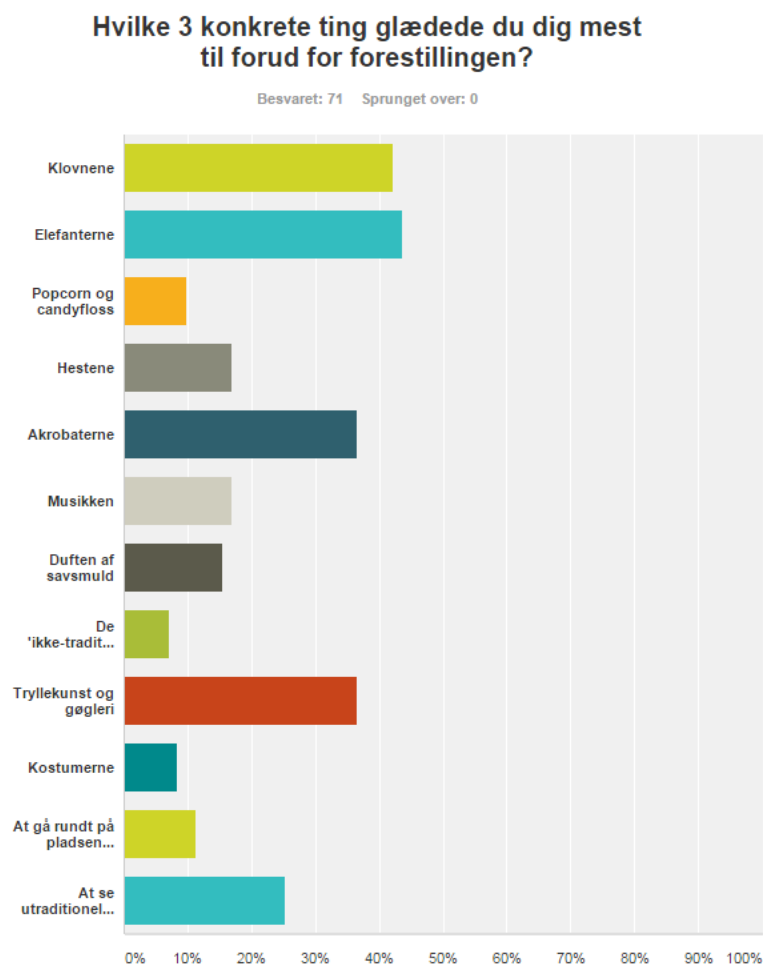
"Jeg var skuffet over at der ikke var mange elementer af 'det gode gamle cirkus' - ingen elefanter, ingen heste, sprechstalmeisteren manglede lidt energi og magi, der var ikke så meget 'liv' på pladsen og fritternummeret var kedeligt efter min mening..."

"Der var meget, som ikke hører til cirkus f.eks. breakdance. Børnene var skuffet over at der ingen elefanter var. Det var ikke rigtig cirkus."

"Det var et fint univers for børn men det var ikke det jeg forstår ved cirkus"

"Det var nogle fuldstændig fantastiske figurer, der blev præsenteret, men det var ikke noget med cirkus af gøre..."

But what is traditional circus to the target group? What do they mean when they say it is not circus-y enough? And what did they look forward to the most prior to the show?



The top scorers are all the traditional circus elements: the clowns (fun), the elephants (thrill), the acrobats (danger) and the jugglers and magicians (magic), who together makes for a sense-satisfying experience. It is also noteworthy that while 25 % of the respondents look particularly forward to experiencing new and innovative acts ('utraditionelle nytænkende numre'), only 7 % are excited about experiencing non-traditional *animal* acts.

A conclusion to this could be that we as circus guests look forward to being impressed by innovative acrobat acts and other 'human' acts that tests the extraordinary talents and boundaries of our human capacity (and remember, we are not easily impressed so the new-ness factor is important for us to actually buy a ticket), whereas the 'innovative' animal acts tend to underwhelm, so here too we prefer new *types of acts*, but with the traditional *types of animals*.

5.2.1 The Circus *Feeling* According to Survey Respondents

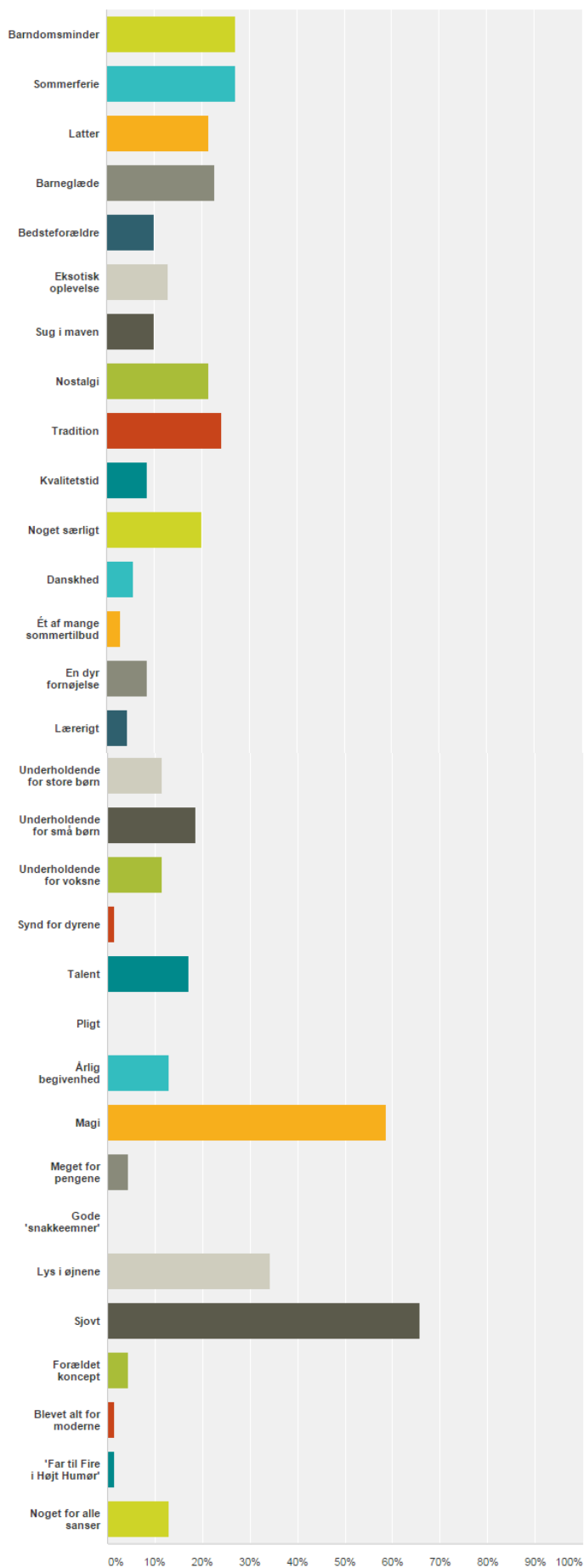
The 'practical' aspect of the circus experience is just one part though, because one thing is the content (which acts, degree of innovation etc.), but another is the emotions – the *feeling* and connotations the target group associate with the word circus.

For one of the questions in the survey I therefore listed 31 statements and asked the respondents to choose the ones *they* associate with circus. Some of the statements were positive (laughter, entertaining for smaller children/older children etc.), some negative (expensive, a 'duty', outdated concept...), some spoke to emotions (nostalgia, butterflies etc.) and some were more cultural/behavior minded ('Danish', tradition, summer vacation) and so on.

As you will see in the graph on the next page, '*fun*', '*magic*', '*light in the eyes*', '*childhood memories*' and '*summer vacation*' rank the highest, - all positive words, which, together with '*tradition*' and '*nostalgia*' fit well with the strengths and the 'core' of circus as we have talked about so far.

Hvilke af følgende følelser/stemninger/ord forbinder du med cirkus (sæt gerne flere X'er)

Besvaret: 70 Sprunget over: 1



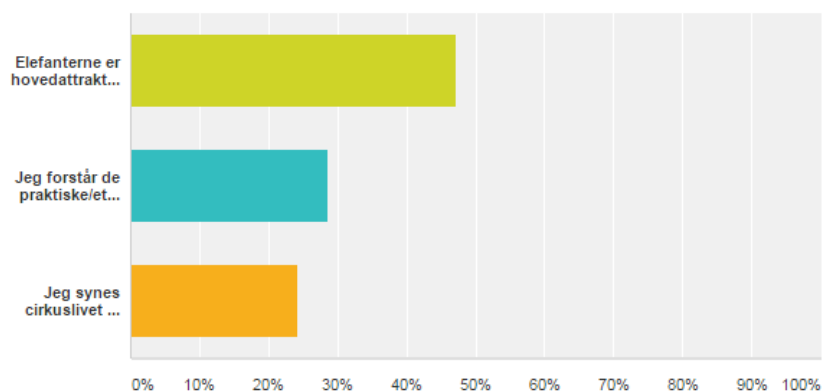
The question about the elephants is a topic that clearly divides the respondents. It has been forbidden by law to recruit more wild life elephants into circus, so in the coming years circus elephant acts will become more scarce, - and as mentioned earlier, the rules concerning their wellbeing and living/working environment have gotten a lot stricter.

Of the traditional Danish circuses Circus Arena still has three elephants of its own, and circus Dannebrog has one, whereas Benneweis have chosen to no longer have elephants as part of their show – and have actually made it part of their strategy and image as Dawid Benneweis explains:

”Nej, det gør der ikke (kommer elefanter i Benneweis igen, red). Det går vi simpelthen for meget ind for dyrevelfærd i forhold til. Der er nogle konsekvenser – eller, der er nogle meget strikte regler for dét at holde elefanter i cirkus, og dem kan vi for så vidt godt overholde, men jeg tror også bare at tiden er inde – og det tror vi alle sammen i Cirkus Benneweis – at tiden er inde til at folk efterhånden går mere op i hvordan dyrene har det, end hvad de egentlig præsterer. Den trend vil vi følge med på, og derfor vil vi, som det eneste større cirkus i Danmark, ikke have elefanter med.”⁷⁰

Hvad synes du om, at flere og flere cirkus dropper elefanterne?

Besvaret: 70 Sprunget over: 1



Svarvalg	Besvarelser
Elefanterne er hovedattraktionen, så jeg gider ikke tage i cirkus hvis der ikke er elefanter	47,14% 33
Jeg forstår de praktiske/etiske hensyn, men er splittet da cirkus ikke er det samme uden...	28,57% 20
Jeg synes cirkuslivet er synd for elefanterne, så jeg er glad for, at flere cirkus dropper dem	24,29% 17
I alt	70

⁷⁰ Source: phone interview with Dawid Benneweis – see transcription in appendix 1

Finally the respondents were asked to share their opinions about what the Danish circuses anno 2014 are missing in order to stand out from their competition – i.e. Flying Superkids, a trip to the zoo or cinema etc.

As you can see below there were a lot of different – and very constructive – answers, ranging from everything from marketing performance to specific acts to more strategic considerations.

Efter din mening, hvad mangler danske cirkus anno 2014, for at kunne differentiere sig endnu bedre i forhold til øvrige familie-underholdningstilbud som en tur i Zoo, biografen, forlystelsespark eller ind at se shows som Flying Superkids etc.?

Besvaret: 28 Sprunget over: 43

Besvarelser (28)

Tekstanalyse

Mine kategorier

Kategoriser som ... Filtrer efter kategori (Søg besvarelser)

Viser 28 besvarelser

Traditionelt cirkus har mange gode kvaliteter som jeg ved folk i dag vægter meget højt. Desværre er der meget i og omkring cirkus der er håbløs forældet (marketing, internt fokus på budgetter, usund mad, et manglende fokus på gæsterne som medskabere af showet, en overgang fra push til push effekt osv.). Hvis man kan komme de traditionelle værdier i en nyere indpakning, få nogle gode partnerskaber med virksomheder/kommuner og til tider lægge stoltheden en anelse på hylden kan der godt være en fremtid for cirkus. Men det står temmeligt klart, at hvis de fortsætter med at hvile på fortidens laurbær, så ser fremtiden meget sort ud. Clayton Christensen snakker om disruptive innovation, og hvad der her menes er, at store etablerede virksomheder (i det her tilfælde cirkus) har en tendens til at blive overhalet af små virksomheder (biograf, teater, etc.), fordi de store virksomheder ikke vil ændre ved deres kerneforretning, fordi det er den der har gjort dem så succesfulde indtil nu. Men har man ikke fokus på nye tendenser, så udvikler markedet sig så hurtigt, og man bliver efterladt i overhalingsbanen.

11-08-2014 15:11 Vis respondentens svar

Jeg synes faktisk ikke det mangler så meget andet end det det har. Men det kunne være sjovt, hvis der var lidt flere børn med.

10-08-2014 17:00 Vis respondentens svar

Vildere magi!

10-08-2014 15:41 Vis respondentens svar

Mere reklame på de elektroniske medier.

Again the respondents emphasize the traditional, the family values and a more ‘back-to-basic’ approach. One writes: *”Det er vigtigt at de bevarer optræden med dyr, da det jo er det der adskiller dem fra andre aktiviteter. De skal passe på at det ikke kommer til at ligne x-faktor eller lignende shows. De skal bygge cirkusstemningen op, være mere åben og vise deres cirkus frem samt fortælle cirkushistorien, så magien bevares.”*

And another (all respondents are anonymous): *”Det skal være noget for hele familien, gerne noget flere generationer kan være fælles om. Det skal være cirkus*

som i gamle dage, men gerne med bedre mulighed for at komme ind bag ved cirkusmiljøe.”

The last comment I want to highlight here goes a bit more into depth, and lifts up the perspective by looking at the Danish circus industry with business/strategic glasses:

”Traditionelt cirkus har mange gode kvaliteter som jeg ved folk i dag vægter meget højt. Desværre er der meget i og omkring cirkus der er håbløs forældet (marketing, internt fokus på budgetter, usund mad, et manglende fokus på gæsterne som medskabere af showet, en overgang fra push til push effekt osv.). Hvis man kan komme de traditionelle værdier i en nyere indpakning, få nogle gode partnerskaber med virksomheder/kommuner og til tider lægge stoltheden en anelse på hylden kan der godt være en fremtid for cirkus. Men det står temmeligt klart, at hvis de fortsætter med at hvile på fortidens laurbær, så ser fremtiden meget sort ud. Clayton Christensen snakker om disruptive innovation, og hvad der her menes er, at store etablerede virksomheder (i det her tilfælde cirkus) har en tendens til at blive overhalet af små virksomheder (biograf, teater, etc.), fordi de store virksomheder ikke vil ændre ved deres kerneforretning, fordi det er den der har gjort dem så succesfulde indtil nu. Men har man ikke fokus på nye tendenser, så udvikler markedet sig så hurtigt, og man bliver efterladt i overhalingsbanen.”

This comment in many ways hits the nail right on the head and highlights so many interesting aspects worth considering in this process of rethinking and reshaping the strategy of the traditional Danish circus industry.

- Traditional values in new packaging (innovation within existing ‘frame’)
- More user interaction (guests become part of the acts)
- Set pride aside and be open to new opportunities/ways of doing things
- More ‘out’ of the box’/Blue Ocean thinking
- Focus on family activity trends → i.e. healthy food options

Without knowing who the particular respondent is who wrote this very well-reflected comment, I think it is noteworthy that all of this is so obvious to an ‘outsider’ – a circus guest, and the fact that this was written by someone who is not part of the industry, just goes to show that something *must* be done to change the development.

5.3 Thoughts from within the Industry:

As mentioned in the introduction to the chapter, I have also spoken to some of the *insiders* in the Danish circus industry; the people for whom I am primarily writing this Thesis, which will hopefully help them in their strategy process in the seasons to come.

The circus directors and circus families in Denmark are publically known to be quite competitive and don't often unite for a cause, so I am very pleased to have been able to talk to three influential and powerful circus people: Agnete Louise Enoch, Director of Cirkus Dannebrog and from the older generation, Dawid Benneweis – son of Director Diana Benneweis and from the young generation, and René Mønster, Director of Cirkus Baldoni, and former employee of Cirkus Arena.

As mentioned in the introduction, the aim with the thesis is to discuss the competitive position of Danish circus as an *industry*, against other family entertainment activities, technological development etc., and it is interesting that the circus industry itself actually share many of the thoughts, pro's and con's as the circus guests expressed in the questionnaire survey.

Just as many of the circus guests commented, the buzzword for the circus people themselves, also seem to be *tradition*.

Dawid Benneweis for instance says: *"Der er ikke nogen tvivl om, at vores største udfordring er, at der er så mange underholdningsalternativer i dag. Folk bliver lige så godt underholdt af deres Netflix og deres YouTube i dag, og derfor mister vi en lille smule grebet om den tradition som cirkus var og er, fordi den bliver erstattet af alt muligt andet."*⁷¹ And he continues: *"...jeg véd at der bliver arbejdet på det lige nu – at vi kommer ud til folket, og skal have os forbundet med dem, så vi får den her tradition tilbage, som jo liger bag cirkus."*⁷²

In this statement lies a hopefulness for the future of Danish circus, and perhaps also a realization of the fact that circus have maybe experimented a bit too much outside their 'frame' the past seasons in the search of finding its place in the entertainment industry as a whole:

⁷¹ See full phone interview transcribed in Appendix 1

⁷² Ibid

*"Jeg tror bestemt ikke at cirkus er tabt bag en vogn på den måde; jeg tror den nye generation bare skal vænne sig til hvad det er for noget. (...)lige nu for os handler det mere om traditionen – det traditionsrige cirkus, og jeg tror man skal passe på med at eksperimentere alt for meget."*⁷³

Agnete Enoch seems shares this opinion: *"Mit motto når det kommer til at trække generationerne ind i cirkus – altså publikum er: traditionelt cirkus med lidt nyt – men ikke for meget nyt."*⁷⁴ Agnete, whose father started Cirkus Dannebrog again 38 years ago, is involved in all activities from selling shows, to handling the press, presenting acts and controlling the finances, and she also stresses the importance of the way a show is communicated – the semantics and how people relate to that:

*"Vi skifter jo koncepter hele tiden og i år var vores tema 'Dynamic Youth', og der må jeg sige at 'Dynamic Youth' har simpelthen fået de bedste anmeldelser. Vi modtog 6 gange 5 stjerner og 1 gang 6 stjerner, plus gode karakterer i de aviser, der ikke bruger stjerner. Problemet var at vi har fejltituleret showet, for når man kalder det 'Dynamic Youth' tror folk – altså generationerne, der kommer i cirkus – at det her kun er noget for det unge publikum. Min personlige mening er, at det blev for moderne det hele."*⁷⁵

This also goes to show that it is not about competing with i.e. Flying Superkids by moving into their 'ocean' with the youth focus, but rather about finding back to traditional circus' own core, which is tradition, generations and family.

Therefore it is also interesting to hear how the Danish circuses feel about incorporating their long and fantastic family stories more into their shows and their marketing, as this is truly what makes the bigger circuses like Dannebrog and Benneweis unique:

To the question of whether this is something Cirkus Benneweis has considered, Dawid Benneweis answers: *"Det kan man sige – ja, det har vi helt klart. Det bliver første år i år hvor både min søster og jeg som er ren Bennweis skal være med, og det er noget vi har tænkt os at slå noget mere på – det her med familietraditionen og at*

⁷³ Dawid Benneweis – see appendix 1

⁷⁴ Agnete Enoch interview – see appendix 2

⁷⁵ *ibid*

vi er tilbage i cirkus Benneweis, som jo har været ejet og ført af vores familie gennem mange, mange år.”⁷⁶

Agnete Enoch too recognizes, that this aspect is maybe worth focusing more on:
”Altså vi har lidt stående inde på vores hjemmeside. Om min far og min mor, og lidt om hvad vi står for som cirkus, men måske det netop var vigtigt for sådan et cirkus som vores, at gøre lidt mere ud af det.”⁷⁷

For a circus like Cirkus Baldoni, who doesn't have the same history to draw on, it is all about creating a unique atmosphere for the audience, and to improve each year by presenting high quality acts: *“Vi satser på nærheden og stemningen. (...)Vi skal være bedre til at holde på vores publikum men også være bedre til at få et nyt publikum ind, og for det nye publikum skal vi markere at det er et nyt program hvert år. Vi oplever tit at folk siger at det så vi sidste år!!”⁷⁸*

Apart from the three fundamental values *tradition, generations* and *family*, *high-class acts* are therefore also more important than ever. The technological development and high media focus on ‘talents’ as entertainment makes the target group more and more critical and increasingly harder to impress. A few clicks on YouTube, America's Got Talent etc., will take the most extraordinary acts right into the comfort of people's living rooms, so the acts have to be truly special and innovative – and presented in a unique setting and atmosphere - for people to want to watch them ‘live’.

And as mentioned in the analysis of the survey results, this innovation is not in the *types* of acts presented in circus, but rather new ways of seeing traditional acts, so the core remains the same, but the quality is heightened and shows the best within the field.

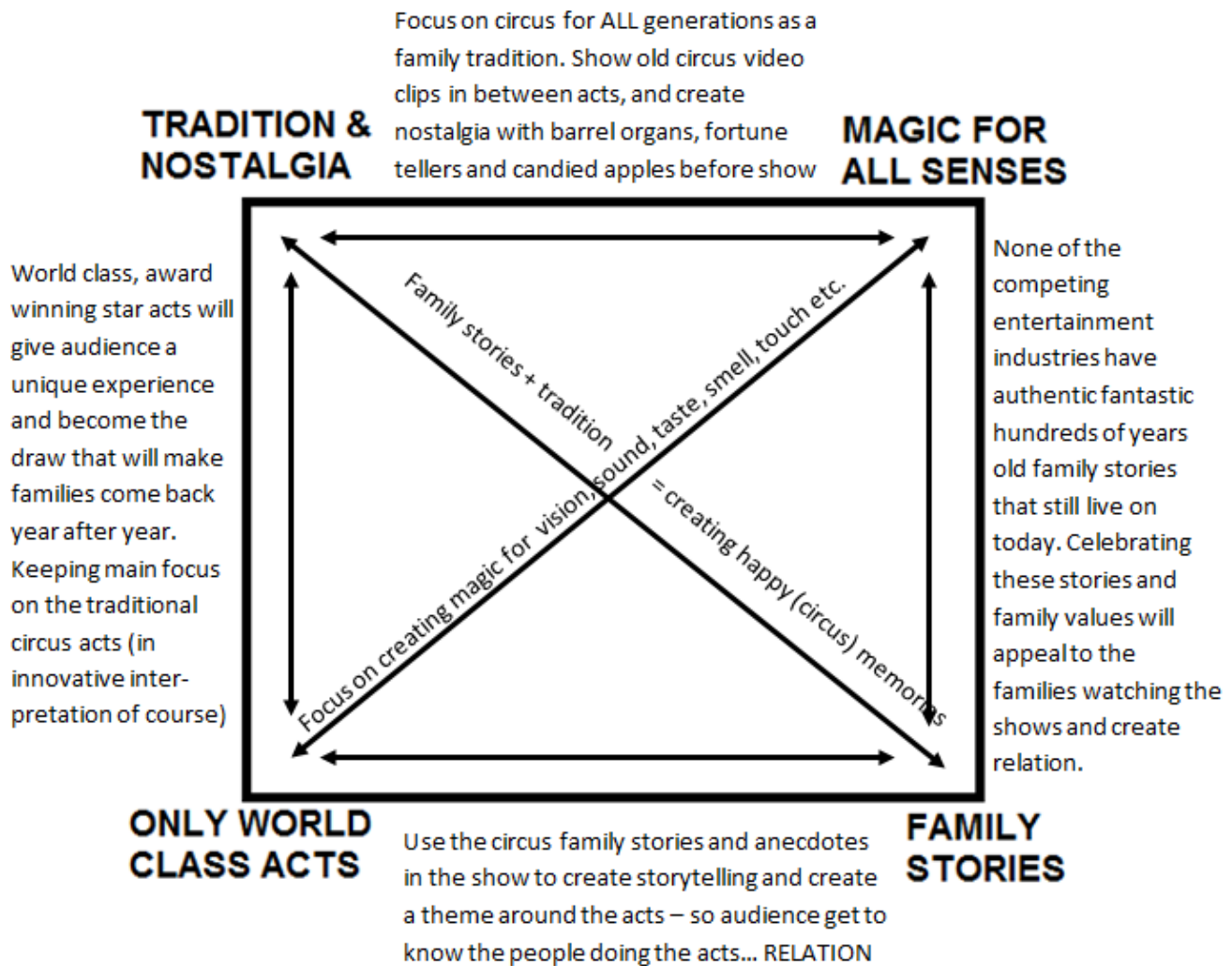
Together the four strategic cornerstones therefore look like this, and on the basis of all the analyses, strengths and weaknesses discussed so far, this is the overall frame I recommend the traditional Danish circus industry to work with in the future to ensure their survival and place in the family entertainment industry as a whole:

⁷⁶ See appendix 1

⁷⁷ See appendix 2

⁷⁸ E-mail interview with René Mønster– see appendix 3

5.4 Strategic Cornerstones



Made by Bradley Beswayan, 2014

This strategic frame involves all aspect covered so far, except for the animal theme, which is due to the fact that the animal situation is so different between the seven touring Danish circuses.

There is no doubt that the elephants and other large exotic animals are a big attraction, but with the law restrictions, they cannot be part of the future strategic core for the Danish circuses. Circus Benneweis, as we know, has had its last season with elephants, and Diana Benneweis is convinced that this is not a problem:

“Til gengæld er jeg overbevist om, at cirkus vil bestå uden dyr. Det varer sikkert ikke længe, før visse dyrearter bliver forbudt i Europa, men først og fremmest i

Skandinavien. Og det er helt i orden for mit vedkommende. Det var min fars opfattelse at dyr var selve grundlaget for cirkus. Det mener jeg ikke; på det punkt har jeg skiftet mening med årene. Man har lov at blive klogere. Forbyd dem endelig, men lad os beholde hestene og hundene.”⁷⁹

René Mønster agrees: *”Det er korrekt at elefanter er et stort trækplaster, jeg har en fortid i Arena og der var et år hvor der ikke var elefanter og det var et katastrofeår. Men tiderne ændrer sig til mere og mere dyrevelfærd og etik. Hvis du havde foretaget spørgeskemaundersøgelsen hos os og du havde et punkt hvorpå der stod, hvad savner i i Cirkus Baldoni, ville elefanter kun blive nævnt i meget få tilfælde. Elefanter i cirkus er en uddøende race da der ikke kan komme nye elefanter til. Hvis man ser de største succeser indenfor de seneste 20 år er det cirkus uden elefanter og flere helt uden dyr. Cirque de Soleil, Roncalli, Flic-Flac og så naturligvis hele nycirkuskulturen som stormer frem. Vi har valgt at køre stilen næsten uden dyr selvom vi har forsøgt os, bl.a. sidste år, men det viste sig at det var ikke derfor folk kom hos os, hvilket leder tanken hen på at hvis vi havde elefanter med så ville der ikke komme så mange flere til og som kan dække omkostninger til sådanne numre, så helt klart ja cirkus kan overleve uden elefanter og også uden dyr.*”⁸⁰

It is important to distinguish between 'no elephants' and 'no animals at all' in circus, as we must remember that animals in general is one of the main things that distinguish traditional circus from contemporary circus. The questionnaire survey also concluded that the audience is very much looking forward to watch the other traditional circus animals such as the horse – which again gives connotations to nostalgia, circus traditions, circus princess, and circus family stories and so on.

It is my recommendation that the larger Danish circuses keep horses and other types of animals as part of their shows, - again with focus on high quality acts – as the experience of being close to larger animals is usually quite significant for children and something they will remember, and want *their* own children to experience some day...

⁷⁹ Diana Bennweis 'Alting har sin pris' (2005)

⁸⁰ E-mail interview, see appendix 3

6.0 Action Plan

How each circus choose to take action to the strategic frame recommended, of course varies – and *should* vary in order to also differentiate themselves from one another. The common ground though, is the questions they each need to find their own answers to:

- *How to market circus to 'all generations'?*
- *How to actively use circus family story in show and marketing?*
- *How to elongate experience without moving focus from the actual show?*
- *How to attract the best acts in the world?*

In the following I will present some thoughts and ideas to how this can be done, by presenting an action plan/idea catalogue for the traditional circuses to be inspired from.

6.1 How to Market Circus to 'all Generations'?

6.1.1 Who is the target group?

The target group for traditional Danish circuses is very broad, as it involves 'familien Danmark' – the Danish families in all its generations and constellations; children, parent(s) and grandparents – *his, hers* and '*our*'.

The target group therefore per say hasn't changed over the past years, since families have always been the target, but there are still some interesting shifts and changes worth mentioning:

- The older generation stopped going to circus when the 'old' directors (Eli Benneweis, Haddy Enoch etc.) died and was passed on to the next generation.
- More families seek towards the larger Danish cities: Agnete Enoch from circus Dannebrog i.e. says:

"Siden min far startede cirkuset for 38 år siden, har han været meget opsat på at det skal være generationernes cirkus. MEN, så sker der jo det at min far dør for 5 år siden, og med ham mister vi ligesom en generation af publikum – de ældre- som også selv måske har mistet en ægtefælle, og så er det ikke

*længere en tradition i deres familie. En anden ting vi har mærket – for vi kommer jo i hele Danmark – er at de unge familier med penge, som før også boede i udkantsdanmark, er flyttet ind til de større byer for at få arbejde osv.*⁸¹

- More families split up, re-marry and the children don't necessarily get to be together with the same parent the same weeks each summer when circus is in town, making it difficult to make a trip to the circus a tradition.

Another target group worth mentioning is on the B2B side, where the circuses sell shows to private company events, mall openings etc. outside of the ordinary season, but in this paper focus is on the B2C side and the 'average' Danish families, whereas Zirkus Nemo and Cirque du Soleil etc. target a more adult, highly educated, and 'up-town' segment.

Roberto Zanola from the Rimini Center for Economic Analysis in Italy wrote an article in 2006 on the 'Major Influences on Circus Attendance'⁸², and here he mentions 'price elasticity', 'laws concerning animal welfare' and 'income' + 'province/city' as the main factors influencing how many people come to circus. The topics of income and province vs. city fit well with the observations in the Danish market from Agnete Enoch as quoted above, and with the many new economic restrictions and costly administrative procedures, the end result may very well be, that the Danish circuses will no longer be able to visit all the smaller cities in the outskirts of the country, but more on that in Chapter 7.0.

6.1.2 Marketing channels:

Marketing is defined as "*the methodology of communicating the value of a product or service to customers, for the purpose of selling that product or service*"⁸³ and marketing *channels* refer to the media, activities, visual aspects etc. chosen to convey the message - sell the product/service - to the target group.

It is not only about selling tickets in the short term though, but according to the new strategy, it is also about creating loyalty and a sense of tradition amongst the target

⁸¹ Appendix 2

⁸² Major Influences on Circus Attendance, Roberto Zanola, Rimini Center for Economic Analysis (RCEA), Rimini, Italy

⁸³ Kotler and Keller: 'A Framework for Marketing Management' (4th ed.). Pearson Prentice Hall

group, and this is therefore also one of the main objectives behind the communication.

Put roughly it can be said that the main purpose of the communication is to create:

- **Awareness** of the circus
- **Interaction** with the target group
- **Affinity** with the audience
- **Loyalty** towards the circus and families running them

CEO of Enger Group Management and Consulting, Peter Enger, who is also a non-tenured teacher at University of Southern Denmark, has worked a lot with these objectives in relation to i.e. social media and e-business in general, where he links each of the objectives to sub-themes of e-commerce methodology.

Below I have used his model to describe which relatively low-budget marketing channels the Danish circuses could make use of, to meet the above mentioned objectives:

Communication Objective:	Marketing Tool(s):
Awareness	Circus posters/flyers Press releases for print media Website Facebook page Instagram YouTube channel Search Engine Optimization (SEO) Collaboration with mommy-bloggers
Interaction	Picture and comment sharing with audience on social media. Use of #hashtags, competitions, polls, giveaways on social media. Ask questions, opinions, their best circus memories, share their best circus picture etc.

Affinity	Exclusive member clubs/loyalty clubs etc. (creates 'shareholder' feel) Being asked to share personal circus photos on social media = feeling of being circus 'ambassador'
Loyalty	Loyalty-program with advantages, 'Generation-tickets', 'Circus-passes', 'Golden Tickets' etc. Circus-families as 'idols' with the young generation having their own public Facebook page, YouTube channel etc. their 'fans' can follow and like...

Although the Thesis is theoretically grounded, and therefore by definition not a hands-on management report in that sense, I will still just bring a few practical ideas on the next pages on some of the initiatives and activities the Danish circuses could consider, in the process of executing the new strategic frame:

6.1.3 Idea: Collaborating with Danish Mommy-bloggers

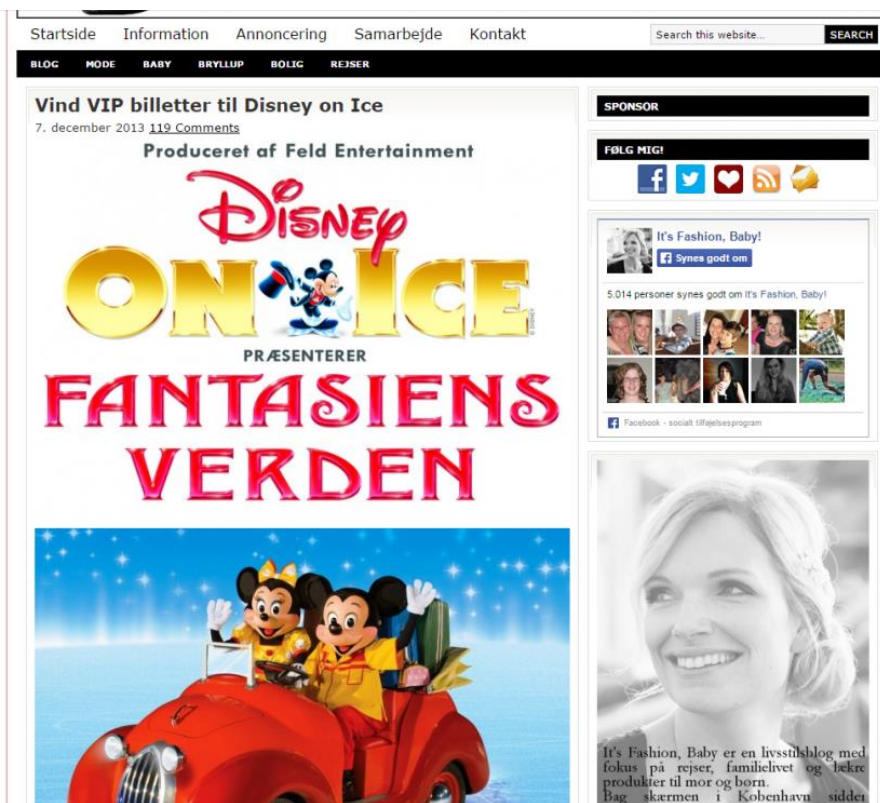
Advertising through personal blogs, has increased tremendously over the past 5 years, as companies and organizations from all industries have realized how big – and specific – part of their target group they can reach in a low-budget, authentic and personal way, where it is the blogger who recommends the product/experience and give his/her personal recommendations, which those who follow the blog tend to respect/copy/agree with/applaud.

For something like circus, the so-called 'mommy-bloggers' would be the ideal collaboration partners. Usually the process would be to pick out a handful of Danish bloggers based on the content of the blog, number of views, clicks etc. per month and so on. The organization – here circus – will then initiate contact and i.e. invite the blogger and her children as VIP's to experience the circus when it comes to their town, and in return she will share her experience in pictures and words on the blog with links to the circus' website – and maybe even host a reader competition where the readers can get a chance to win tickets for themselves by i.e. *liking* the circus' Facebook page, share their best circus memory in a comment etc.

In Denmark, some of the most popular – and diverse – mommy-bloggers at the moment are:

- Itsfashionbaby.dk by Lisbeth Kiel Bjerrum
- Maschavang.dk by Mascha Vang
- Guldlog.dk by Louise Guldager
- Lortemor.dk
- Ridersontherainbow.dk by Camilla Kaasby-Wang

Over the past year these bloggers have i.e. made sponsored posts about everything from a day in Knuthenborg Safari park to the premiere of a new Lego movie, to i.e. the Disney on Ice show as shown in the picture below – all activities that traditional circus compete with.



The above post was published on the blog Its Fashion Baby, run by mom Lisbeth who write about life with her two kids 'Trutten' and 'Fidusen' age 5 and 3. Last year Lisbeth and Trutten was invited the watch the Cirkus Summarum show (in return for a blog post naturally), and here are some of the things she wrote accompanying the photos:

"Trutten og jeg var så umådelige heldige, at vi i går havde fået pladser på første parket til Cirkus Summarum (link)– og han har stort set glædet sig lige så meget til det som til vores bryllup 😊

Han ELSKEDE hele showet – han råbte med, sang med på fællessangene, fægtede med sit lysdyr og hoppede op på stolen, så snart han blev bedt om det. Det var fedt at se ham så opslugt – og jeg havde også selv en fest. Showet er nemlig krydret med en masse sjove vittigheder til de voksne – som er lige tilpas lumre til at børnene ikke forstår dem 😊

Hvis I endnu ikke har købt billet, så kan jeg varmt anbefale jer at se, om I ikke kan finde et par ledige billetter (link) – børnene elsker alle de kendte figurer fra DRs Ramasjang – og det er ikke en traditionel cirkusforestilling men nærmere bare en masse sjove numre og shows med Bamse, Hr Skæg, Bruno, Rosa fra Rouladegade osv. ”⁸⁴

Lisbeth continues her post by sharing some good advice for other families before they go watch the show such as *"best for children over 3 years old", "Make sure to buy one of the glowing animals they sell – they cost DKK 50, but the kids love them", "bring a lunch pack for the break and your own candy. They don't sell real food and the candies are expensive", "I recommend central seating – not too far out the sides"* etc. etc.

In the comments below the post the readers then share their own experiences, give each other good advice, and ask Lisbeth questions and all comment on what a great show it is, creating such good and positive feedback and PR.

I highly recommend the traditional Danish circuses to try out a similar approach – again with focus on family values, family traditions and nostalgia combined with cutting edge world-class acts.

A university student studying Social Media, Communication etc. would most likely be thrilled with the possibility of an (unpaid) internship involving the planning and execution of this task, and statistic tools and tracking makes it easy to measure on the results and impact of the collaborations.

⁸⁴ www.itsfashionbaby.dk

, BABY! MANJA CHAVY GOLDEN GHETTO MINI MALSEN CAND.MOR 4 MINI MES // PETIT PODIUM\\ BABYDUTTEN TH

derind.

Første gang vi var afsted var et par måneder før han fyldte 3 år. Og allerede dengang var det et kæmpe hit for ham!

Han har så siden han var ganske lille kunne sidde stille ret længe og kunne fint koncentrere sig om hele showet (og blev ikke bange undervejs)

Vi har valgt at tage lillesøster på 2 år. med om nogle uger. Hun har set sidste års show (på dvd) sådan cirka 100 gange og selvom hun har lidt mere krudt i r.... er jeg sikker på at det bliver et stort hit for hende.

Så jeg vil sige aldersmæssigt kommer det meget an på ens barn – hvad man selv vurderer de kan holde til.

Mht. råd, er jeg enig i det med flere lag tøj, da der nemt bliver rigtig varmt derinde..

Og selv medbringe noget vand til under forestillingen.

SVAR

mulle says:

15. juli 2013 at 17:53




der er et telt hvor man både kan amme og skifte børn, kaldes mamas teltet.

ja, der kan være varmt inde i teltet, men de har et godt tilbud på vand 1 for 15kr. og 2 for 20kr.

SVAR

Lisbeth says:

20. juli 2013 at 12:21



Tak for input – det med Mamas teltet havde jeg ikke selv opdaget – og ja, vand var heldigvis dejligt billigt 😊

SVAR

Eva says:

25. juli 2013 at 22:50



Vi havde vores datter med første gang i 2010 – en md før hun fyldte to. Hun var bjergtaget fra start til slut. Vi havde vand med til hende i sutteflasker, det var super. Dengang var det lyset, lyden – og Bamse, der vakte størst jubel. Efterhånden som hun bliver ældre er det sjovt at følge, hvordan hun bliver mere og mere optaget af det narrative i forestillingen. Jeg synes derfor, at C.S.s anbefalede aldersgrænse på 2 år er meget fint ramt (men børn er jo forskellige)

6.1.4 Idea: Creating a Loyalty Program

- Loyalty Program: Save your circus ticket(s) and get loyalty-discount next season. Bring ticket from last year = 10 % off on new ticket, bring ticket from 2 years ago = 20% off, 5 year old ticket = 50% off etc. Customers with a

ticket more than 50 years old get free entrance. The latter especially will be a good story to advertise in the press – are there any grandparents out there who have kept their ticket all these years, and who are willing to share their memories and perhaps bring their grandchildren? Local newspapers and magazines like FamilieJournalen and Ude & Hjemme will love stories like this. Also, when it comes to it, a lot of families will misplace or lose their ticket between this season and the next, so it might not be as costly as it sounds, but the PR will be priceless.

- Generation-Ticket: A way of rewarding the families where three or more generations go together with i.e. 15% off on the whole order, half price for grandparents etc.
- Circus-Pass: An add-on one can buy for their ticket for i.e. 120 DKK extra, that gives 1 free popcorn, the chance to ride a camel/horse/elephant, have photo taken with one of the artists, and get circus activity book and crayons to play with when they come home or something in the line of that. This way the parents or grandparents doesn't actually have to get money out of their pocket *during* the show and a 'packet-solution' may very well raise the revenue of the add-on activities that are also a big part of circus.

6.2 How to Actively Use Circus (Family) Story in Show and Marketing?

6.2.1 Family Storytelling in Marketing

My initial idea for using family storytelling in the marketing of the traditional circuses, revolved around a 'Founding Families' campaign, where my thought was, that if the industry 'oldies'; Cirkus Dannebrog, Cirkus Arena and Cirkus Benneweis joined forces (and marketing budgets) and created a TV campaign *together*, they would stand much stronger against their industry competitors (Tivoli, Zoos and so on) and at the same time eliminate recent years' negative PR about the rivalry between the circus families.

The TV spot should feature both the 'old' and the young generation of the 'founding families' and be nostalgic, 'feel-good' – and have focus on family circus traditions

passed on through generations. Like those Weather's, Coca Cola or Sainsbury commercials we all love and remember for their ability to go straight to our heart...

Ole Simonsen, who knows all of the families is skeptical about the idea though, as he doesn't believe the circuses will be likely to join forces in this manner, the way things are now: *"Traditionelt har de enkelte cirkus betragtet hinanden som konkurrenter og ikke som kolleger. Selv om de efterhånden har fundet ud af, at de på en række punkter har sammenfaldende interesser, anser jeg det p.t. som mindre realistisk at de i fællesskab laver en markedsføringsindsats for at få flere folk i cirkus. Hver enkelt vil kun slå på tromme for sig selv."*⁸⁵

It is still my clear recommendation though, that the industry players start considering each other more as colleagues than rivals and see the other family activities as their biggest threat rather than each other. In this case at least. Individually they each have their own niche in the traditional circus scene, and joining forces in a marketing campaign is a big step in the right direction – just like they have recently joined forces as an industry to get under the Ministry of Culture as explained in chapter 7.0

Other initiatives that can be done separately for each circus on their own include:

- Update websites with family history, 'profile' pages for family figureheads, personal photos, videos and diary-like blog posts.
- More personal/family focus on social media platforms
- More 'behind-the-scenes' movie clips. The Berdino family was recently featured in a documentary called 'Cirkusdynastiet' with great success, but it could also be something as simple as a young member of the family 'showing around' the circus tent (with Lilleper's circus song as background music) introducing his/her family: *'this is my cousin, who sells tickets, this is my mom the circus princess, this is my granddad who is the director, and my great great grandfather had two tigers...' and so on.*
- More emphasis on family values in press material and in interviews
- Etc.

⁸⁵ See e-mail correspondence with Ole Simonsen in Appendix 4

6.2.2 Family Storytelling in Show

As mentioned in the strategy section, the use of family history, anecdotes etc. can be very beneficial in creating a personal relation to the audience, add some authenticity and nostalgia and tradition to the show, as well as a red thread to bind it all together. It is a way of looking back – and get a chance to look behind the façade of the fascinating circus world – while still keeping it contemporary with the younger generation of the founding families now in focus like i.e. Dawid and Nadia Benneweis from Circus Benneweis and Patrick Berdino from Circus Arena.

If using Circus Benneweis as an example, a low-budget concept could be:

- The show starts in the tent with total silence and all lights off. A projector projects a small movie/dias show on to a roll-up screen⁸⁶ behind the red carpet, which is pulled to the side, like in an old cinema. The audience chew on their popcorn, and the show is about to start. The movie is made in black and white – in the style of an old Charlie Chaplin film, with vintage sound effects and accompanied by traditional old circus/carrousel music. The film, which would only last a few minutes show small movie clips and still images from Circus Benneweis throughout the past 128 years. Pictures of Eli Benneweis, children eating cotton candy, a young Diana as a circus princess etc., and while the images float by, Dawid and Nadia stand in the arena, doing a live voiceover where they explain how the circus is a real family business, and share some personal anecdotes about the grandfather, their mother and the development of the circus etc. At the end of the film the screen is rolled back up, the music changes pace, Dawid and Nadia say their welcomes and enjoy, and present the Sprechstallmeister, who comes riding in on a white horse like a real circus princes.
- In between the various acts the Sprechstallmeister will continue sharing small anecdotes. As an example: when introducing the horse number, she will explain how the horses have always been close to Diana's heart and this season she has made sure to bring in an award winning horse act starring X from country Y etc. etc. This way the act and the performer is still in focus,

⁸⁶ *lærred

but it is also personal and relatable because the audience can now link it to the pictures of a young Diana on horseback from the intro-movie, and believe her judgment that this is a world class act she has personally picked out for them.

- The same way, before i.e. Dawid Benneweis does his act (or Patrick Berdino if the example was about Circus Arena) a small 'behind-the-scenes' video (still in black and white to keep the theme) could be shown on the roll-up screen where he talks a little about growing up in circus, shows around his trailer, a few clips of him practicing etc. At the end there could be a link to his YouTube channel and Facebook page, where the audience could follow him. This is a modern approach, that combines social media and authenticity and seeks to make the Benneweis (Dannebrog/Arena etc.) family members the 'idols' or 'star acts' that people relate to and come to see year after year. A differentiation approach.
- In the break and before/after the show when the audience walk outside the tent, Cirkus Baldoni have tried interpreting and sharing *their* story as big billboards with facts, pictures, timeline etc. on the sides of the circus trailers. This is an effective and low-budget approach worth sharing as a good example, as it is a way of setting a mood and giving the audience something to do/read/talk about when waiting in line for the toilet etc., that doesn't require any personal.
Digital roll-up banners with hologram-projections of some of the family members would also be a fun, magical and easy-to-pack-up-and-down solution to story-telling, although a bit more costly than billboards.

6.3 How to Elongate Experience without Moving Focus from Actual Show?

6.3.1 Before the show + in break:

The focal point of a circus experience is what happens inside the circus tent – the magical universe that transports the audience to another universe for a few hours. However, part of giving the audience the feeling of getting 'more value for money' is

making the experience last longer at the same cost, and here the activities outside the tent and in the break are vital.

The activities should be low budget for the circuses and require a minimum of human resources and be easily installed/uninstalled and transported. Apart from the billboards and roll-up banner with historic and behind-the-scene images, the activities outside the tent could include:

- A 'face in hole' photo wall with fun circus figures. Families can then have fun taking pictures with their cellphones, which they can upload to Facebook or Instagram and tag the Circus' page as well for the chance to win a price. There should be one winner in each city.
- A classical, nostalgic barrel organ sets the mood in a second, and triggers the hearing sense...
- Trampolines and hula hoops for children to try and play with are more circus-like than i.e. jumping pillows, and maybe once in a while a few of the artists can show off some tricks
- Getting close to the animals is a big part of the circus experience for many children, and a small petting zoo with i.e. a pony, a goat and a pig – who are not necessarily part of the show – is a positive way of making the audience interact and be activated prior to the show and in the break.
- Automatic stations such as a coin insert fortune teller or similar is also a possibility – and something that will help set the mood and magical feel...
- Circus props such as ringmaster costumes, hats, magic set, juggling balls etc. for children may also be a hit so the children can recreate the experience and universe at home (loyalty generator), just as selling light bulb circus letters for interior decorating will surely be a hit with older children and adults, and very on trend with the present industrial vintage trend.

- Finally an idea could be to make say 5 'Golden Tickets' per show, and the people lucky enough to get them can use them to get free popcorn and cotton candy, upgraded seats, a tour behind the red carpet of the arena in the break and an on stage appearance in the clown number or similar. The children who get the golden tickets will get a unique experience that will make them loyal for life.



6.3.2 During the show

More user interaction during the show with select audience participation on stage 'the Golden ticket receivers' for i.e. illusion numbers and clown numbers. Involve audience more: *'This act requires complete silence and concentration, so put be quiet as a mouse for the next few minutes, and wave your glow sticks gently from side to side like calming waves...'*. Activate the audiences' senses! Another approach could be to integrate a little more impulsivity by letting the audience choose between different options along the way that changes the performance.

6.3.3 After the show:

Elongate the circus experience for the audience by offering them evaluate their experience as a family when they come back home. This could be done by making a quiz on their website where people can test their knowledge and what they remember from the show/learn about the animals etc.

Colour books, mobile/iPad games, or sharing their pictures from the day on Facebook when they come home, are also ways of elongating the experience.

7.0 'The Elephant in the Room' – the Financial Aspect

The last chapter of the Thesis deals with the financial situation for the tradition Danish circuses. As mentioned throughout the paper, the circuses are struggling with a very high amount of fixed costs before they can even put up the tents, so the economic discussion – the elephant in the room – so to speak, is inevitable and necessary to have when talking about the future survival of traditional Danish circuses.

Where the previous chapters of the thesis deal with a lot of new data and discussions, which haven't been much in focus in the press, academic circles or the public in general, - the economic discussion has been a bit more profiled over the past years. For better and for worse. There seem to be two major themes in the discussion:

- 1) The question of whether the traditional circus industry should be put under the Department of Culture and receive support from the state, or whether they should remain under the Department of Justice.
- 2) The question of whether the massive increase in fixed costs and administrative requirements makes it impossible for traditional circus to compete with other family activities.

If we start out by getting an impression of how the Danish circuses themselves experience the financial situation, the message is clear all the way around:

Dawid Benneweis says: *"Man kan sige, der er kommet SÅ mange udgifter før vi overhovedet kan få lov at sætte cirkusteltet op. Først skal vi ansøge kommunen og brandvæsnet – alt omkring byggetilladelser, og jordbundsprøver skal være i orden osv. – der er SÅ meget administrativt arbejde og der skal lægges SÅ mange penge før vi overhovedet kan få teltet op, og dét gør det svært for os at være konkurrencedygtige. Kommunerne er blevet meget, meget strikse med det hele; før kunne vi stå på Harald Jensens mark og så var alle glade... Det kan vi ikke længere, og vi må ikke sætte plakater op de samme steder som vi måtte før. Så er der Staten – vi får ikke statsstøtte, fordi Staten ikke mener vi er kunst og det gør det meget svært at drive cirkus."*⁸⁷

When asking Agnete Enoch what she believes are the biggest financial obstacles, she mentions three things that she would hope to see:

"Punkt 1: lavere pladsleje hos kommunerne

Punkt 2: vi skulle være momsfrie

*Punkt 3: det nye med at vi nu skal have byggetilladelse for at slå teltet op, fordi Arena havde et uheld sidste år, koster os også rigtig mange penge. Det er alt sammen ekstra udgifter for os. Den anden ting er, at alt det her betyder, at der måske er nogle af de små byer rundt omkring i Danmark, der mister den store aktivitet som cirkus er, fordi det bliver for dyrt og bureaukratisk. For det er jo ikke kommunerne, der betaler os for at komme til byen – det er os, der betaler kommunerne. De burde jo være lykkelige for at vi kommer til byen."*⁸⁸

Apart from all these expenses, René Mønster also mentions how it has i.e. become more expensive and time consuming to get temporary resident and working permits for the international artists, it has become increasingly expensive to drive around the country due to special permits to drive into environmental zones etc. etc.⁸⁹ All while the ticket prices have remained somewhat consistent, which has put the entire industry under great pressure.

⁸⁷ Dawid Benneweis interview, see appendix 1

⁸⁸ Agnete Enoch interview, see appendix 2

⁸⁹ René Mønster interview, see appendix 3

What must be mentioned though is that the traditional Danish circus industry has had a history of being very closed and non-cooperative towards discussing their economy.

In 2003 a Danish law student, Søren Kastoft Nielsen, from the University of Århus wrote a dissertation called: *Cirkus – nok se, men ikke høre?*⁹⁰ where he addresses this issue from a historical point of view.

Søren explains how in 1969 for instance, former Minister of Culture, K. Helveg Petersen wrote a publication concerning the circus life in Denmark, where he states that Cirkus Benneweis and Cirkus Schumann were both against receiving state support. In the years and decades to come, the opinion towards the subject stayed the same, which is underlined by the below quote:

*”Cirkusrådet er blevet bedt om at udarbejde en redegørelse for cirkusforholdene i Danmark, men har ikke været i stand til det, fordi rådet ikke har fået svar på de gennem cirkusdirektorforeningen stillede spørgsmål vedr. bl.a. regskabs- og budgetforhold.”*⁹¹

This also emphasizes what was mentioned earlier about the difficulty of receiving financial data from this much closed off industry. Part of the reason for the unwillingness to cooperate lies in the fact that the rivalry among the players in the industry has been so fierce over the years, and in a recent article in Danish newspaper Politiken, the Director of circus Arena, Benny Berdino also says:

*“Folk i branchen er optimister, og vi er et stolt folkefærd. Måske er det også derfor, vi ikke før har villet snakke med pressen om økonomi. Vi har bare sagt, at det går godt. Men nu holder grenen ikke længere, og det er kun et spørgsmål om tid, før den knækker.”*⁹²

15 years ago the Chief of Press in Circus Arena, Christian Warrer, had plain rejected the very idea by saying: *”Nej, vi vil ikke have cirkusstøtte. Se på teaterbranchen, hvor teatrene lukker, og der sidder diverse råd og bestemmer. Et cirkus er ikke en kulturinstitution, det er et liberalt erhverv”*⁹³, but times – and situations have

⁹⁰ Source: http://books.google.dk/books/about/Cirkus_nok_se_men_ikke_h%C3%B8re.html?id=5nDsSAAACAAJ&redir_

⁹¹ Lorenzen p. 130 as referred to in Kastoft Nielsen, Søren (2003)

⁹² <http://politiken.dk/kultur/scene/ECE2242630/danske-cirkus-er-paa-vej-mod-konkurs/>

⁹³ Kastoft Nielsen, Søren (2003)

changed and the majority of the circus industry has now had a joint meeting where they have discussed matters and agreed that now they are ready for a change to happen. "*Ellers vil der måske ikke være noget, der hedder cirkus i Danmark om fem år*", says Berdino, who estimates that where 600,000 Danes visited circus a few years ago, the number is now down to 475,000 visitors per year.⁹⁴

The pride Berdino mentions, together with the high-intensity rivalry and strong sense of independence that characterizes the industry has so far been an industry weakness and an obstacle. Back in 2003 Søren ended up concluding that circus just hadn't been interested in cooperating with the state and making the necessary changes, and this of course also means that the State and the Department of Culture may now also have their doubts about a future cooperation.

Diana Benneweis once said: "*Vi er et frit folk. Derfor bryder vi os ikke om, at andre blander sig i vores arbejde. For alting har sin pris: hvis staten giver os penge, vil den også forlange indflydelse på for eksempel vores turnplan.*"⁹⁵ To some degree she is probably right. Cultural funds are rarely given to simply support the day-to-day running of a cultural institution; they are given to support new initiatives and will most likely also include some form of result contracts, demands of cooperation with certain education institutions, agreements about how many percent of the artists should be Danish etc. So with public support comes of course also certain obligations, and the question is how the traditional Danish circuses can find a way to comply to them, without having to move too much in a contemporary circus direction, as this will defeat their very purpose to stand out.

None of the municipalities I have asked have wanted to comment on the possibility of lowering the prices for the circuses again in the (near) future, but it is my believe that the circus industry has a strong 'supplier' power here, as they bring a unique activity to the city, and at no cost for the city at all. On the contrary, in fact...

I recommend Tivoliforeningen, who is the industry organization for all Danish circuses, make a more solid effort in the near future to put pressure on the municipalities.

⁹⁴ <http://politiken.dk/kultur/scene/ECE2242630/danske-cirkus-er-paa-vej-mod-konkurs/>

⁹⁵ JydskeVestkysten, d. 6/4 1997

8.0 Conclusion

“Ladies and gentlemen, boys and girls, children of all ages... Tonight’s show has now come to an end, and what an interesting night it has been!”

The conclusion is clear. Traditional Danish circuses need to work more together as an industry, in order to survive in the near future, and be competitive against the various other family entertainment activities on the market.

They must work together *AND* make efforts individually to move focus back to the good family values, traditions and experiencing something together as a family (of more generations).

They must work together – *AND* make efforts individually to showcase their own unique family stories more, as this is what sets them apart from i.e. the contemporary shows, who are stealing more and more of their market shares.

Finally, the traditional Danish circuses must continue to work together on the financial aspect as well, to ensure better survival and growth conditions for their industry in the near future.

Work together to survive.

There is no doubt that the future for Danish circus look frightfully daunting at the moment, but by following the recommendations in this thesis; applying a new core strategy, changing up the marketing mix and viewing their competitors in a new light, I believe the industry life span curve has the *potential* to go upwards again.

When talking to the members of the different circuses and other industry insiders, they seem to all be more or less on the same page and share a lot of visions and thoughts about the development of their industry in the future.

It is my hope that this Thesis will help bring these people closer together, to see that their main goal is the same, and that the synergies they can create together, is what will make or break them as individual organizations as well. *“Damn everything but the circus!. . .The average 'painter' 'sculptor' 'poet' 'composer' 'playwright' is a person who cannot leap through a hoop from the back of a galloping horse, make people laugh with a clown's mouth, orchestrate twenty lions.”* E.E. Cummings.

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Interviews (primary data)

E-mail interview with René Mønster

Phone interview with Dawid Benneweis

Phone interview with Agnete Enoch

E-mail interview with Ole Simonsen

Questionnaire with 71 anonymous respondents

APPENDIX 1:

Transcription of phone interview with Dawid Benneweis conducted in October 2014.

(Beginning of interview with greetings, thanks, who I am and why I am calling. We talk about that we are both the same age – 26, what I am studying and why it has been difficult for me to get in touch with circus people willing to talk to me.)

Bradley (interviewer): *Jeg vil gerne have lov til at stille dig 6 spørgsmål, og her kommer det første: Hvad ser du som de største udfordring for dansk cirkus i øjeblikket?*

Dawid (respondent): Jamen der er rigtig mange udfordringer. Tænker du på i forhold til at få flere mennesker i cirkus, eller det praktiske med at sætte cirkus op, eller hvad tænker du på? For der er rigtig, rigtig mange udfordringer.

B: *Lad os tage den med at få flere mennesker i cirkus, til at starte med...*

D: Der er ikke nogen tvivl om, at vores største udfordring er, at der er så mange underholdningsalternativer i dag. Folk bliver lige så godt underholdt af deres Netflix og deres YouTube i dag, og derfor mister vi en lille smule grebet om den tradition som cirkus var og er, fordi den bliver erstattet af alt muligt andet.

B. *Kan du uddybe lidt på det?*

D: Ja, altså folk forbinder nok ikke cirkus med den tradition, som man forbandt det med i gamle dage, så det er jo et problem som vi arbejder med, og arbejder på at komme med nogle nye tiltag, som kan ændre på det.

B: *Vil du sige noget om hvordan I helt konkret gør det?*

D: Ja, altså der er blevet prøvet mange forskellige ting, og det handler også om at vi hele tiden skal udvikle os, men det bliver noget med at man skal fange publikum på en anden måde end man hidtil har gjort; det tror jeg på.

B: *Ja okay...*

D: Det er noget at gøre med – uden at jeg ved så meget om tingene, jeg véd bare at der bliver arbejdet på det lige nu – at vi kommer ud til folket, og skal have os forbundet med dem, så vi får den her tradition tilbage, som jo liger bag cirkus.

Jeg tror bestemt ikke at cirkus er tabt bag en vogn på den måde; jeg tror den nye generation bare skal vænne sig til hvad det er for noget.

B: Ja, det er lige dét jo... Hvis vi skal gå lidt videre, så har I jo i år haft jeres første sæson uden elefanter. Hvordan var det, og kommer der elefanter i cirkus Benneweis næste sæson?

D: Nej, det gør der ikke. Det går vi simpelthen for meget ind for dyrevelfærd i forhold til. Der er nogle konsekvenser – eller, der er nogle meget strikte regler for dét at holde elefanter i cirkus, og dem kan vi for så vidt godt overholde, men jeg tror også bare at tiden er inde – og det tror vi alle sammen i Cirkus Benneweis – at tiden er inde til at folk efterhånden går mere op i hvordan dyrene har det, end hvad de egentlig præsterer. Dén trend vil vi følge med på, og derfor vil vi, som det eneste større cirkus i Danmark, *ikke* have elefanter med.

B: Ja okay, så det er én af måderne I differentierer jer på. Men hvordan har reaktionerne fra publikum været på at I ikke havde elefanter med i år?

D: Man kan sige, grunden til at vi ikke havde elefanter med i år, var at vi fandt ud af, at ham vi skulle have haft, ikke kunne overholde kravene, så ham kunne vi selvfølgelig ikke tage. Det var noget man først fandt ud af to uger før sæsonstart, så dét at der både var annonceret med elefanter i det første program, på nettet og på de plakaterne, der hænger på vejene, gjorde at vi også fik nogle reaktioner, som ikke har været så positive.

B: Ja, det kan man vel godt forstå. Hvis vi skal springe lidt videre til noget andet, så jeg ikke tager ALT for meget af din tid, vil jeg høre om I har overvejet at lave lidt mere nogle temaer for jeres forestillinger?

D: Det har vi jo faktisk gjort fra 2000-2005, og det er selvfølgelig noget vi overvejer fra år til år, men lige nu for os handler det mere om traditionen – det traditionsrige cirkus, og jeg tror man skal passe på med at eksperimentere alt for meget. Det er vores klare fornemmelse, at når folk først har prøvet at være i cirkus én gang, så vil

99% synes at det er noget de har lyst til at prøve igen – og så handler det selvfølgelig bare om for os at få dem til at komme igen, så det ikke kun er en engangsforestilling.

B: Når nu vi snakker så meget om tradition og familier, så kunne jeg godt tænke mig at spørge, om I har overvejet at bruge jeres familiehistorie noget mere i jeres forestillinger og i jeres marketing?

D: Det kan man sige – ja, det har vi helt klart. Det bliver første år i år hvor både min søster og jeg som er ren Bennweis skal være med, og det er noget vi har tænkt os at slå noget mere på – det her med familietraditionen og at vi er tilbage i cirkus Benneweis, som jo har været ejet og ført af vores familie gennem mange, mange år.

B: Super. Nu er vi kommet til det sidste spørgsmål: Hvad synes du om idéen med at skabe mere value for money ved at tilbyde gæsterne nogle flere aktiviteter før forestillingen går i gang – der er f.eks. nogle, der er begyndt med hoppeborge osv.

D: Ja, jeg forstår hvad du mener, og der er vidst også allerede nogle cirkus, der gør den slags, men jeg tror man skal passe rigtig meget på med ikke at flytte fokus fra det det handler om, og hvorfor man er der...

B: Kan du uddybe det lidt:

D: Ja, altså jeg synes man skal passe på med hoppeborge osv., for så kan folk lige så godt tage i tivoli. De er der for at se en cirkusforestilling, og så mener jeg bedre man løser udfordringen ved at tilbyde noget der er nært til cirkus som at få taget billede med klovnen, mulighed for at ride en tur på en hest, kamel eller elefant eller hvad ved jeg. Det er trods alt de 2 ½ time i teltet det drejer sig om, - det handler om at folk skal nyde oplevelsen, og så skal vi passe på det ikke bare bliver en stor pengemaskine hvor det handler om hvad man kan prøve og hvordan man kan blive aktiveret udenfor forestillingen.

B: Tusind tak- det er nogle rigtig brugbare svar. Jeg vil lige høre her til sidst om jeg må nævne dig med navn i opgaven eller om du helst vil være anonym?

D: Nej, du må gerne bruge mit navn – det gør ikke noget; vi vil bare gerne se opgaven før du sender den, for vi har tidligere haft en dårlig oplevelse med en studerende, der fulgte os en hel sæson.

B: Jamen selvfølgelig. Og jeg vil lige understrege at det handler ikke så meget om konkurrencen mellem jer cirkus indbyrdes, men mere konkurrencen mellem cirkus og de andre aktiviteter som f.eks. Tivoli – og så selvfølgelig alt det her med den teknologiske udvikling osv.

D: Det er også et sindsygt spændende emne, og noget vi jo også selv gør meget for at følge med i. Man kan sige, der er kommet SÅ mange udgifter før vi overhovedet kan få lov at sætte cirkusteltet op. Først skal vi ansøge kommunen og brandvæsnet – alt omkring byggetilladelser, og jordbundsprøver skal være i orden osv. – der er SÅ meget administrativt arbejde og der skal lægges SÅ mange penge før vi overhovedet kan få teltet op, og dét gør det svært for os at være konkurrencedygtige. Kommunerne er blevet meget, meget strikse med det hele; før kunne vi stå på Harald Jensens mark og så var alle glade... Det kan vi ikke længere, og vi må ikke sætte plakater op de samme steder som vi måtte før. Så er der Staten – vi får ikke statsstøtte, fordi Staten ikke mener vi er kunst og det gør det meget svært at drive cirkus.

Hvis du har flere spørgsmål må du endelig ringe igen.

(...and then we rounded off the interview by talking about which e-mail address to send the paper to once finished, and how happy I was that he was willing to talk to me so openly.)

APPENDIX 2:

Transcription of Phone Interview with Agathe Enoch, Director of Cirkus Dannebrog – conducted in October 2014.

(Beginning of interview with greetings, thanks, who I am and why I am calling. We talk about that I am from the Philippines and my Danish is therefore not perfect, and then before I even get to ask any questions, Agnete herself starts telling her story)

Agnete Enoch (respondent): Jeg kommer jo virkelig fra en meget gammel cirkusfamilie her i Danmark og jeg selv startede da jeg var 4 år gammel og kom med i min fars cykelnummer. Vi har rejst i 35 lande på 5 kontinenter, og så for 38 år siden genetablerede min mor og far cirkus Dannebrog. Så jeg har været med i markedsføringen lige siden...

Bradley (interviewer): *Hold da op – det lyder som et stort arbejde?*

A: Ja, det er et rigtig stort arbejde, og også fordi – jeg sælger jo også mange hele forestillinger til virksomheder og aviser og supermarkeder osv. Og det er jo stadig et familiecirkus, men de sidste mange år har det været min opgave at skaffe penge, og jeg har jo godt kunnet mærke omvæltningen. At der ikke kommer så mange folk i cirkus mere, at der er kommet en masse store internationale shows til, som folk gerne vil se – og folk har jo ikke penge til det hele... Vi skal også tænke på, at vi er kun 5 millioner mennesker i Danmark, og der er jo ikke alle, der er cirkus-mindede.

B: Nej, det er selvfølgelig rigtigt.

A: Og dét, det går ud på, er hvordan cirkus kan overleve i Danmark, ikke også?

B: Ja, lige præcis. Min opgave handler meget om, hvordan cirkus som en industri kan være konkurrencedygtig overfor de andre aktiviteter, der er for familier – f.eks. Tivoli, zooligisk have, biografter osv. Jeg har nogle specifikke spørgsmål jeg gerne vil stille dig, og det første handler om dine tanker omkring elefanter i cirkus i fremtiden? På den ene side kommer der jo flere og flere lovmæssige krav, men på den anden side er de også bare stadig en rigtig stor attraktion for publikum?

A: Ja, altså nu har vi jo haft elefanter i mange år. Vi havde to store elefanter selv, som vi havde i 10 år, og de ER jo et stort trækplaster. Det er det første publikum spørger

om, når de bestiller biletter: hvilke dyr har I med i år. Og i år prøvede vi så også at have dresserede køer med. De har faktisk vundet guld i Monte Carlo, og har også været i Amerika med the Ringling Brothers, og i år var de faktisk også et rigtig stort trækplaster.

Vi skifter jo koncepter hele tiden og i år var vores tema 'Dynamic Youth', og der må jeg sige at 'Dynamic Youth' har simpelthen fået de bedste anmeldelser. Vi modtog 6 gange 5 stjerner og 1 gang 6 stjerner, plus gode karakterer i de aviser, der ikke bruger stjerner. Problemet var at vi har fejltituleret showet, for når man kalder det 'Dynamic Youth' tror folk – altså generationerne, der kommer i cirkus – at det her kun er noget for det unge publikum. Min personlige mening er, at det blev for moderne det hele, for der var jo også elementer af det gamle cirkus: jeg var selv i manegen, orkestret var det samme som altid, men spillede helt moderne musik, og ham, der har med dyrene at gøre, var jo heller ikke lige blevet 40 år yngre...

Forrige år gjorde vi det modsatte med 'Cirkus som for 100 år siden' og det var også fantastisk, men forestillingen var for langtrukken, og året før havde vi 'Amazing Africa' hvor de fleste af artisterne var farvede og hvor vi arbejdede sammen med Røde Kors og samlede en masse penge ind. Så det handler hele tiden om hvordan vi kan trække. Mit motto når det kommer til at trække generationerne ind i cirkus – altså publikum er: traditionelt cirkus med lidt nyt – men ikke for meget nyt.

B: Det leder mig faktisk lige hen til næste spørgsmål, for når vi snakker om målgrupper og generationer, så kunne jeg godt tænke mig at høre om I retter jeres marketing mod børnene eller mod deres forældre eller bedsteforældre, og hvorfor?

A: Jeg skal nok svare på dit spørgsmål, men jeg synes det er interessant at en fra Filippinerne spørger indtil sådan nogle kulturelle mønstre vi har her i Danmark. Er du selv gift med en dansker?

B: Nej, men jeg er sammen med en dansker...

A: Okay, men nu skal du høre. Min far var jo direktør i cirkus Dannebrog. Den rigtige direktør, sådan som du kan forestille dig med høj hat osv. og han var også i sig selv lidt et trækplaster dengang. Det er mig, der har været ringmaster siden 1972 og jeg er også lidt den gamle type, hvis du forstår hvad jeg mener, så jeg har også været prinsessen, eller dronningen eller hvad man kan sige. Men det jeg ville sige

var, at siden min far startede cirkusset for 38 år siden, har han været meget opsat på at det skal være *generationernes* cirkus. MEN, så sker der jo det at min far dør for 5 år siden, og med ham mister vi ligesom en generation af publikum – de ældre- som også selv måske har mistet en ægtefælle, og så er det ikke længere en tradition i deres familie. En anden ting vi har mærket – for vi kommer jo i hele Danmark – er at de unge familier med penge, som før også boede i udkantsdanmark, er flyttet ind til de større byer for at få arbejde osv.

Det er bare sådan *jeg* ser det, men lige præcis med dét, tror jeg at jeg er den i cirkusverdenen, der ved det bedst, for jeg har både hængt plakater op, jeg er annocechef, jeg er pressechef, jeg er direktør, jeg sælger forestillinger, jeg er artist – jeg laver det hele, hvor de andre cirkus hele tiden får nye ind.

Men spørger du om, om cirkus kan overleve, så vil jeg svare: Ja, det kan det godt.

B: Nu har du snakket en del om jeres fine familiehistorie, som du selv er en rigtig stor del af, men har I overvejet at bruge den lidt mere som noget storytelling både i forestillingerne og i jeres markedsføring?

A: Altså vi har lidt stående inde på vores hjemmeside. Om min far og min mor, og lidt om hvad vi står for som cirkus, men måske det netop var vigtigt for sådan et cirkus som vores, at gøre lidt mere ud af det.

Man må regne med, at f.ek.s Cirkus Benneweis – de har jo også en historie, men sagen er den, at de har jo kun Diana Benneweis tilbage, og hun er ikke cirkus Benneweis - og hun har ladet andre mennesker styre hendes cirkus. Mens cirkus Arena – det er blevet så stort, at det heller ikke dér er selve familien, der som sådan styrer cirkusset mere. De får andre til at gøre det, som ikke er cirkusmennesker.

(Here after we spoke a little about her husband having performed at the famous circus building in Manila in Philippines 45 years ago, and their love story and when I came to Denmark etc.)

B: Mit næstsidste spørgsmål handler om hvad du ser som den største udfordring for dansk cirkus lige i øjeblikket?

A: Punkt 1: lavere pladsleje hos kommunerne, punkt 2: vi skulle være momsfrie og som punkt 3: det nye med at vi nu skal have byggetilladelse for at slå teltet op, fordi

Arena havde et uheld sidste år, koster os også rigtig mange penge. Det er alt sammen ekstra udgifter for os.

Den anden ting er, at alt det her betyder, at der måske er nogle af de små byer rundt omkring i Danmark, der mister den store aktivitet som cirkus er, fordi det bliver for dyrt og bureaukratisk. For det er jo ikke kommunerne, der betaler os for at komme til byen – det er os, der betaler kommunerne. De burde jo være lykkelige for at vi kommer til byen.

Man skal tænke på at ikke kun os, men også cirkus Benneweis og cirkus Arena, som har rejst rundt i mange år, vi brænder jo for det, men bliver truet på vores eksistens. Men det vigtigste er, at vi brænder for det. For det skal man. Takken man får er når publikum klapper og er begejstrede, for så har man glædet en hel masse mennesker, og det er det, det går ud på.

B: Lige præcis. Her til sidst vil jeg høre, om jeg må bruge dit navn i opgaven, eller om du helst vil være anonym?

L: Nej, det må du godt. Og du må også godt skrive at jeg jo er vokset op i cirkus, jeg er vokset op i showbiz, og har rejst hele verden rundt, så det er ikke bare sådan en ny én, der lige er kommet til cirkus... Jeg arbejder tit 10-20 timer om dagen, men det gør mig ikke noget, hvis bare cirkus kører. For hvis cirkus dør, så dør jeg også. Jeg vil gøre alt for at føre vores familiecirkus videre. Jeg er sikkert sat i verden for at udføre en mission – det er det jeg tror på – and the show must go on.

(Ending remarks with thanks, and Agnete saying she looks forward to reading the paper, and hopefully be inspired and get some good ideas.)

APPENDIX 3:

E-mail Interview with René Mønster, Director of Cirkus Baldoni. October 2014

René's answers are highlighted in bold italic under each question.

Hej Rene,

tusind tak for din mail; jeg er simpelthen så glad for at du har lyst til at hjælpe med nogle kommentarer til min opgave. Kort fortalt er jeg i gang med at skrive en kandidatafhandling fra Syddansk Universitet og de traditionelle danske cirkus' overlevelsesmuligheder i fremtiden set ud fra et strategisk, marketingmæssigt og økonomisk synspunkt.

Jeg tager ikke udgangspunkt i ét cirkus, men den danske cirkusbranche som helhed i forhold til at skulle konkurrere mod alle de andre sommer-familie-aktiviteter, der findes på markedet (contemporary shows som Flying Superkids, Summarum m.v., forlystelsesparker, 3D-biografter, zoo osv.)

I den forbindelse vil jeg derfor høre dig, om du har lyst til at knytte nogle kommentarer til nedenstående spørgsmål og observationer jeg har gjort mig indtil nu? Det er helt op til dig om du vil være anonym eller jeg må nævne dig med navn i min opgave, og uanset hvad vil jeg rigtig gerne sende jer opgaven når jeg er færdig til december, da den forhåbentlig kan give lidt inspiration og idéer.

1. Jeg har blandt andet lavet en spørgeskemaundersøgelse med en masse danske cirkusgæster, som fx. har svaret på hvad de glædede sig mest til forud for sommerens forestillinger. Her lød top 3 en:

1) Akrobaterne

2) Elefanterne

3) Duften af savsmuld

Elefanterne er jo et ret stort issue for tiden. Der er nogle etiske og lovmæssige ting og krav i det, men samtidig er de også et kæmpe trækplaster og hvad er cirkus overhovedet uden elefanter...

1.a Dét kan jeg så passende spørge dig om, for det er mit klare indtryk at I klarer jeg ganske fint uden?

Det er korrekt at elefanter er et stort trækplaster, jeg har en fortid i Arena og der var et år hvor der ikke var elefanter og det var et katastrofeår. Men tiderne ændrer

sig til mere og mere dyrevelfærd og etik. Hvis du havde foretaget spørgeskemaundersøgelsen hos os og du havde et punkt hvorpå der stod, hvad savner i i Cirkus Baldoni, ville elefanter kun blive nævnt i meget få tilfælde. Elefanter i cirkus er en uddøende race da der ikke kan komme nye elefanter til. Hvis man ser de største succeser indenfor de seneste 20 år er det cirkus uden elefanter og flere helt uden dyr. Cirque de Soleil, Roncalli, Flic-Flac og så naturligvis hele nycirkuskulturen som stormer frem. Vi har valgt at køre stilen næsten uden dyr selvom vi har forsøgt os, bl.a. sidste år, men det viste sig at det var ikke derfor folk kom hos os, hvilket leder tanken hen på at hvis vi havde elefanter med så ville der ikke komme så mange flere til og som kan dække omkostninger til sådanne numre, så helt klart ja cirkus kan overleve uden elefanter og også uden dyr.

1.b Men er det ikke svært at differentiere sig fra diverse ny-cirkus forestillinger og shows som Flying Superkids, Summarum m.v. når de store eksotiske dyr ikke er en del af jeres identitet?

Vores cirkus skiller sig ud fra de store på andre måder end dyrespørgsmålet. Vi satser på nærheden og stemningen der er specielt hos os samtidig med at vi sammensætter forestillingen på en anderledes måde i forhold til de øvrige danske cirkus.

Men jo vi mærker alle de nye tiltag der tager vores publikum, hvor Summarum løber med den største del. Publikum vil, som du selv antyder, have mere. Vi har selv lavet en undersøgelse for et par år siden og det var netop konklusionen at der skulle være mere end blot forestillingen. Vi har så lavet lidt tiltag bl.a. ved at hænge plancher op på vores vogne og som fortæller om cirkuslivet, hvad vi laver om vinteren, hvordan vi bor osv. osv. Grundet vores størrelse er vi nødsaget til at lave tiltag der ikke kræver personale. Vi er fortsat i gang med at lave nye tiltag for den kommende sæson der kan gøre oplevelsen bredere.

1.c Jeg tænker at det især sætter rigtig store krav til standarden/kvaliteten på fx jeres akrobatnumre, og når det er nogle i booker fra Kina og andre lande, er der vel også en ret stor usikkerhed/risiko forbundet med det? Forstået på den måde at 'kontrollen/forhandlingsmagten' ligger lidt på 'leverandørens' side og kan have et

stort udfald for sæsonens program og succes (i forhold til hvis man 'bare' havde sin EGEN elefant eller verdens-artist, som man vidste var et sikkert trækplaster år efter år). Forstår du hvad jeg mener?

Næ, jeg forstår ikke helt hvad du mener. Man køber artister ind som man køber alt mulig andet. Vi får sendt links til Youtube videoer fra nær og fjern enten direkte fra artisterne eller gennem agenter der præsenterer dem og udfra dem vælger vi hvad vi vil have og flere af dem vi booker kommer igen nogle år efter. Kvaliteten for vores vedkommende ligger for de fleste numre fuldt på højde med de store cirkus.

1.d Hvordan foregår processen med at udvælge og booke acts til næste sæsons program?

Er der vist svaret på i ovennævnte

1.e Hvilke udfordringer/fordele oplever i? Ved at være et dansk cirkus (omdømme?) Ved at være et forholdsvis lille cirkus?

De store udfordringer ligger i at få folk til at indse at cirkus er en oplevelse der ikke kun er for børn og familier med børn og det lykkedes hen af vejen ved at vi ser der kommer flere og flere uden børn. Som branche ser vi jo af Nemo brager derudaf med fulde huse og det er kun for voksne. Der er selvfølgelig nogle udfordringer på pressens side at blive hørt når man er et lille cirkus, vi har jo ikke generationers genkendelighed eller kendte mennesker med, men omvendt så har vi heller ikke de udgifter de store har, jeg plejer at sige, hvis vi har en dårlig sæson og mangler 1/2 million så mangler Arena 5 millioner, et kig i regnskaberne hos erhvervs og selskabstyrelsen kan bekræfte dette.

2. Noget andet jeg gerne vil høre dig om, er det her med 'value for money'. Prisniveauet på cirkusbilletter synes jeg ikke rigtig man kan rykke ved; det er stramt nok i forvejen, og i øvrigt meget på niveau med prisen på substituerende oplevelser. MEN kunne man måske gøre noget for at forlænge oplevelsen lidt? Gøre det (mere) spændende at være på pladsen før/efter forestillingen, så det hele ikke kun foregår i manegen? Hoppeborg, kæmpetrampolin, petting zoo med små hunde/geder/kælegrise, unge artister laver trylleskole, stå-på-hænder konkurrence osv. GRATIS + nogle mere særlige ting man kunne tage lidt småpenge for (ride på

en hest, billede med klovnen eller hvad ved jeg). Jeg véd godt at cirkuspladsen jo som regel er 'åben' for publikum hele dagen, men kunne man lave nogle planlagte aktiviteter i timerne inden forestillingen, som ikke kostede de store ressourcer, men gav publikum følelsen af at have fået meget mere for pengene?

Jo som sagt er vi i gang og vi er meget åbne overfor idéer til aktiviteter, blot skal man huske på at det hele skal kunne flyttes fra dag til dag og uden de store setups.

3. Retter I jeres marketing mod børnene eller deres forældre/bedsteforældre? Hvorfor?

Vores markedsføring er først og fremmest plakater i lygtepæle og denne er mest rettet mod børnene. Når vi skriver pressemeddelelse er det naturligvis til de voksne, men med en drejning mod mødre da det som oftest er dem der tager beslutningen eller får idéen til at gå i cirkus.

4. Hvad ser du som den største udfordring for dansk cirkus i øjeblikket? *Tja, at få folk i cirkus er vel det korte svar, men det er samtidig ikke kun i Danmark at vi oplever nedgang. I Tyskland har de mærket nedgangen siden Euroen blev indført, men nu er de skandinaviske cirkus også begyndt at klage. Det er folks interesser og bevæggrunde der går andre veje. For vores vedkommende har vi rettet vores teltstørrelse til, skåret i artistsbudgetet og skåret ned på mandskabet for at få tingene til at hænge sammen. Vi skal være bedre til at holde på vores publikum men også være bedre til at få et nyt publikum ind og for det nye publikum skal vi markere at det er et nyt program hvert år. Vi oplever tit at folk siger at det så vi sidste år !! Andre problematikker som vi har er stigende udgifter. Da kommunesammenlægningen blev en realitet blev kommunernes gebyropkrævning for at leje en plads generelt sat væsentligt i vejret. Artister og arbejdere der kommer fra ikke EU-lande skal have opholds- og arbejdstilladelse, hvilket koster ca. kr. 4.200 pr. person, en afgift der blev indført for et par år siden. Byggesager er også på dagsordenen og nogle kommuner kræver op til kr. 4.000 for tilladelse til at stille teltet op en enkelt dag, hvilket også er en ny udgift efter at der kom fokus på problemet efter at et telt kollapsede sidste år. Partikelfiltre er også en udgiftskrævende sag, vi skal forbedre vores vognpark med 10% hvert år, hvis vi skal have tilladelse til at køre ind i miljøzonerne, dette selvom der er tale om en*

køretur på ½ time ind og ligeså ud igen. Nå men det er jo klynkeri og har vel ikke relevans for dit projekt.

5. Hvilke ydre rammebetingelser (politiske, kulturelle, teknologiske osv.) ville gøre det lettere at drive cirkus i dagens Danmark?

For tiden bliver der gjort en stor indsats fra Tivoliforeningen side (vores brancheforening) for at få cirkus under Kulturministeriet som resortministerium, nu hører vi under Justitsministeriet, hvilket det ikke er nogen der har kunne give os en forklaring på. Der har været holdt et par møder med Kulturministeriet, hvor også vi har anmodet om forskellige former for støtte, men indtil nu har det været afvist.

Tusind tak for dine svar, René.

APPENDIX 4: E-mail from Ole Simonsen:

Kære Bradley

Tak for din mail. Spændende!

Det er svært at få svar fra "cirkusfolket". De frygter at blive misbrugt, og jeg kender i hvert fald et enkelt eksempel på, at en direktør følte sig misbrugt i forbindelse med den hjælp, vedkommende ydede til en person, der skrev en kandidatafhandling, og følte af afhandlingen gav et forvrænget billede af forholdene. Og sporene skræmmer. Kender du for resten Søren Kastoft afhandling fra 2003? Den kan læses på http://www.cirkus-dk.dk/htm/dk/Artikel-cirkus_nok_se_men_ikke_hoere.htm Den person, som jeg refererer til ovenfor, er ikke Søren.

Er du interesseret i, at jeg videresender din mail til nogle cirkusfolk og spørger, om de vil tale med dig? Kommer der positive svar, vil jeg etablere en kontakt. Jeg kan ikke give dig mailadresser (flere har en direkte mail, som ikke alle kender) eller telefonnumre uden samtykke fra vedkommende – det vil blive betragtet som misbrug af det tillidsforhold, jeg har fået etableret til dem.

Dine 3 spørgsmål:

- 1) Godt spørgsmål. Jeg ville ønske jeg kendte svaret. De stagnerende/faldende tilskuerantal viser jo, at der er et problem, som branchen endnu ikke selv har fundet en løsning på.*
- 2) Traditionel har de enkelte cirkus betragtet hinanden som konkurrenter og ikke som kolleger. Selv om de efterhånden har fundet ud af, at de på en række punkter har sammenfaldende interesser, anser jeg det p.t. som mindre realistisk at de i fællesskab laver en markedsføringsindsats for at få flere folk i cirkus. Hver enkelt vil kun slå på tromme for sig selv.*
- 3) Lyder umiddelbart som en god ide. I pausen og undertiden også før forestillingen er der dog flere stede aktiviteter (mod betaling) såsom elefantridning, klovnesminkning og foto med dyr eller artister. Salg af mad er nok mindre realistisk på grund af fødevarestyrelsens krav til hygiejne. – I flere cirkus er der i løbet af dagen fri adgang til pladsen. Men ofte har artisterne m.fl. for travlt til at tage sig af besøgende.*

Også du ønskes en god weekend.

Venlig hilsen

Ole

APPENDIX 5:

Questionnaire used for survey

1. Køn

- ☐ Mand
☐ Kvinde
☐ Dreng
☐ Pige

2. Alder

- ☐ 3-6 år ☐ 7-12 år ☐ 13-19 år ☐ 20-29 år ☐ 30-39 år ☐ 40-49 år ☐ 50-59 år ☐ 60-69 år ☐ +70 år

3. Hvor mange generationer var I afsted, sidst du var i cirkus?

- ☐ Forældre + børn ☐ Bedsteforældre + børnebørn ☐ Par eller venner uden børn ☐ Vi var 3 generationer afsted ☐ Børn alene afsted uden voksne

Andet (angiv venligst)

4. Hvilken landsdel bor du i?

- ☐ Sønderjylland ☐ Midtjylland ☐ Nordjylland ☐ Fyn ☐ Sjælland ☐ Bornholm ☐ Jeg bor i udlandet

5. Hvilket cirkus besøgte I? (hvis flere på én sommer, sæt gerne flere X'er)

- ☐ Benneweis ☐ Baldoni ☐ Zirkus Nemo
☐ Arena ☐ Krone ☐ Cirkus Summarum
☐ Dannebrog ☐ Mascot

Andet (angiv venligst)

6. Hvilke 3 konkrete ting glædede du dig mest til forud for forestillingen?

- | | | |
|--|--|--|
| <input type="checkbox"/> Klovnene | <input type="checkbox"/> Akrobateme | <input type="checkbox"/> Tryllekunst og gøgleri |
| <input type="checkbox"/> Elefanterne | <input type="checkbox"/> Musikken | <input type="checkbox"/> Kostumeme |
| <input type="checkbox"/> Popcorn og candyfloss | <input type="checkbox"/> Duften af savsmuld | <input type="checkbox"/> At gå rundt på pladsen før/efter/i pausen |
| <input type="checkbox"/> Hestene | <input type="checkbox"/> De 'ikke-traditionelle' cirkusdyr | <input type="checkbox"/> At se utraditionelle, nytænkende numre |

7. På en skala fra 1-5, hvor godt levede cirkusforestillingen op til dine forventninger?

1) Ikke pengene værd	2) Jeg var noget skuffet...	3) Det var en helt ok forestilling	4) Forestillingen overgik mine forventninger	5) Det var en fuldstændig forrygende forestilling
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Hvad overraskede dig særligt positivt eller negativt?

8. Hvilke af følgende følelser/stemninger/ord forbinder du med cirkus (sæt gerne flere X'er)

- | | | |
|---|---|--|
| <input type="checkbox"/> Barndomsminder | <input type="checkbox"/> Danskhed | <input type="checkbox"/> Magi |
| <input type="checkbox"/> Sommerferie | <input type="checkbox"/> Ét af mange sommetilbud | <input type="checkbox"/> Meget for pengene |
| <input type="checkbox"/> Latter | <input type="checkbox"/> En dyr fornøjelse | <input type="checkbox"/> Gode 'snakkeemner' |
| <input type="checkbox"/> Barneglæde | <input type="checkbox"/> Lærerigt | <input type="checkbox"/> Lys i øjnene |
| <input type="checkbox"/> Bedsteforældre | <input type="checkbox"/> Underholdende for store børn | <input type="checkbox"/> Sjovt |
| <input type="checkbox"/> Eksotisk oplevelse | <input type="checkbox"/> Underholdende for små børn | <input type="checkbox"/> Forældet koncept |
| <input type="checkbox"/> Sug i maven | <input type="checkbox"/> Underholdende for voksne | <input type="checkbox"/> Blevet alt for moderne |
| <input type="checkbox"/> Nostalgi | <input type="checkbox"/> Synd for dyrene | <input type="checkbox"/> 'Far til Fire i Højt Humør' |
| <input type="checkbox"/> Tradition | <input type="checkbox"/> Talent | <input type="checkbox"/> Noget for alle sanser |
| <input type="checkbox"/> Kvalitetstid | <input type="checkbox"/> Pligt | |
| <input type="checkbox"/> Noget særligt | <input type="checkbox"/> Årlig begivenhed | |

9. Hvad synes du om, at flere og flere cirkus dropper elefanterne?

- ☐ Elefanterne er hovedattraktionen, så jeg gider ikke tage i cirkus hvis der ikke er elefanter
- ☐ Jeg forstår de praktiske/etiske hensyn, men er splittet da cirkus ikke er det samme uden...
- ☐ Jeg synes cirkuslivet er synd for elefanterne, så jeg er glad for at flere cirkus dropper dem

Har du nogle tanker om hvad der evt. kan erstatte elefanterne i cirkus? Andre dyr/numre?

10. Efter din mening, hvad mangler danske cirkus anno 2014, for at kunne differentiere sig endnu bedre i forhold til øvrige familie-underholdningstilbud som en tur i Zoo, biografen, forlystelsespark eller ind at se shows som Flying Superkids etc.?

Færdig