

The logo for 'making music' is located in the top left corner. It consists of the words 'making' and 'music' stacked vertically in a white, lowercase, sans-serif font. The text is set against a red rectangular background that has rounded corners on the right side.

Coronavirus: one year on

Member survey

March 2021

**SUPPORTING AND CHAMPIONING
LEISURE-TIME MUSIC**

Executive summary

This is our third survey – following up on two previous surveys, the reports of which you can find on our website from [March 2020](#) and [September 2020](#).

The headlines

- **A higher than anticipated number of members (17%) have held online events** since March 2020; 8% managed at least one in-person performance; and 3% held hybrid concerts.
- **Confidence is low: only 28% are planning public in-person events between May and August 2021**; half are looking to the autumn for a first performance and over 20% don't know or think it may be 2022.
- **Venues are a recurring theme of concern**: a quarter of members (27%) think they may have to find a different performance and/or rehearsal venue, for a variety of reasons
- The number of groups which have not met or undertaken any activity since March 2020 at all has **reduced from 31% to 18%**; **68% of members now operate online – up from 56%** in September
- However, **57% report their participants don't want to engage online** (Zoomed out, safeguarding/family issues, unable to make noise in the evening etc.); and **47%** state their members don't have the hardware, software or skills to engage online
- **26% (up from 15%)** have produced a virtual performance; and 13% are planning another one in 2021
- **24%** met in person when/where allowed
- Despite the successful vaccination programme, **an astonishing 67%** of groups cite their own **members' anxieties** as the top barrier to a return to in-person activity
- However, **53%** hope to return to meeting in person between May and August 2021, and a further **32%** plan to do so in September
- **82%** of groups (up from 76%) say their financial situation is stable for now, only **17%** (down from 22% in September) describe it as concerning and 1% as serious
- **78%** of groups expect their income in the current financial year to be **below £7,200** (compared to **approx. 46%** in a 'normal' year). By their next financial year, **only 62% of groups expect their income to be so low**, so they hope to be on the way to recovery.
- Making Music's most highly rated support were our risk assessments, interpretation of government guidance, online events, and lobbying and advocacy.

Report of key findings (in brackets, where comparable data are available, figures from September 2020 and March 2020 surveys)

1. Responses:

Total responses: 1050 (1184, 921)

Of which: 58% vocal groups
28% instrumental groups
5% vocal and instrumental combined
7% promoting groups
1% mix of performing/promoting

Very similar to last two surveys; more accurate representation from performing than promoting groups (12% in membership – only 7% responded to survey).

2. Events:

17% of groups held **online** events since March 2020, 9% more than twice. This means over 600 groups in our membership gave this a go. Only **8%** held in-person events. **3%** have held hybrid events.

We live-streamed a short Christmas concert on Facebook. It helped us feel connected to our audience, and to have a purpose for singing together. We didn't encounter any problems - other than no audible audience reaction!

We raised over £2,000 for charity with two on-line concerts. We learned a lot about sound mixing and video editing. First concert had > 600 views, Christmas concert > 400 views and reached a wide audience (including internationally).

It was hard to create, took a lot of time, wasn't the same as a real concert, but we were all glad we'd done something....

We have run a programme of recitals via YouTube. We have booked professional artists as we would for a normal season, but they have recorded a video recital for us that we have streamed. Some of the recitals the artists have recorded themselves, and some we have recorded. We have had to learn how to make, upload and promote recitals digitally, which has largely been successful. We decided to offer the recitals free of charge and to ask viewers for donations. We have been able make a reasonable income this way, although we are unlikely to cover the full costs of the artists' fees.

We will probably continue to live stream our concert in future as we have been able to reach a much wider audience, but it would be good to have a live audience as well.

It really helps having something to work towards in a generally anxious and tedious time. Main issues were publicising the event and helping people to understand the technology.

50 - 100 people were able to enjoy the concerts as well as the 44 present in the hall. People who were too nervous to attend were very grateful for the live streams.

3. Planned public in-person events

Only **28%** of groups are **planning public events** between May and August 2021, with 14% considering outdoor events.

51% are planning their first post-Covid concert between September and December 2021.

That means as many as **21%** of groups are **not planning any events** until 2022, or do not yet know, as they are awaiting the lifting of restrictions and new guidance.

4. Performance venues

73% of groups are hoping to return to their usual venue. Many, however, do not have a regular venue and many also are not yet sure what awaits them venue-wise when restrictions start lifting and they are able to plan.

45% of groups are concerned that the size of their venue, given the need for social distancing, may no longer be (financially) viable.

Other concerns are:

- 10% state there aren't enough suitable performance venues in their area
- 14% say they don't know enough about performing outdoors
- 6% don't think their venue's wifi is good enough for livestreaming
- Worries are voiced about: number of toilet facilities (social distancing); Covid passports and/or testing requirements; adequate ventilation; venues not responding to enquiries; whether school halls will ever be available again; whether audiences will return; venue not Covid-secure; cost of larger venues (required for social distancing)

5. Activity since March 2020

- **18% (31%)** of groups have **not met at all in person or online** to make music or for social activity since March 2020.
- **26%** stopped meeting in person in March 2020 but **immediately started meeting online**, for either social connection or musical activity.
- **42% (30%) didn't immediately start meeting online**, but once they realised coronavirus would be a problem for a longer period of time, began to look into meeting online for musical/social purposes, some not starting until Oct 2020 or Jan 2021.

26% (15%) of groups have produced a **virtual performance** during lockdown. **13%** are planning another recording in 2021.

24% (8%) of groups met in person where/when allowed and **19%** met informally in smaller groups where restrictions permitted.

We have had online social meetings, online rehearsals, indoor and outdoor rehearsals, according to what was permitted at different times. As we are based close to the England/Wales border there have been times when members who live in Wales were not able to attend rehearsals, so we

Zoomed them from the rehearsal venue. Conversely, there have been times when we have been able to meet outdoors in Wales when we couldn't in England.

Since February 2021 we have stopped all activity due to 'Zoom fatigue', we have 80% of the choir saying they will return when we are in person again.

We have not played together in person since March 2020. We have not had any online social meetings either. We have just started having rehearsals by Zoom, as of 1st March 2021.

Occasional social activities online and met to sing socially distanced carols both inside and outside during December only.

Our musical director organised quizzes, talks on composers, Zoom meetings with soloists, Zoom meetings with young composers, show and share evenings, Desert island discs of our patron and another of evening of members' most memorable pieces of music.

For a brief period when regulations allowed we held hybrid online / in person rehearsals to be as inclusive as possible while using a venue that could accommodate only half our members when socially distanced.

We have not met as a complete society since March 2020, but the committee has met online every month and regular newsletters have been published to all members.

6. Barriers to online activity

The biggest barrier to online activity has been that their participants don't want to engage online, for a variety of reasons, e.g. already Zoomed out from work, issues around others in their house/safeguarding etc.. **57%** report this as an issue.

And **57%** say that 'online is just not musically the same' as a reason for not engaging.

47% say their **members don't have the skills, software or hardware they need to engage online**. That is a big group which is digitally excluded – still, after one year of so much online activity and growth.

9% report that broadband is simply not good enough for their participants and/or MD.

13% (25%) have engaged online but find it **hard to sustain a programme of activity week after week**. This means that since the September 2020 survey, more groups have developed even more creativity and ingenuity to make their online programme compelling for their members to attend!

However, **35%** report fewer than 70% of their members joining in; and **11%** get fewer than 35% of their usual group numbers taking part.

We made the decision to hibernate and not attempt online music-making.

Following a challenging 12 months, our new MD joined us in Jan 2020, so when C-19 arrived, I was determined the Choir would continue. I held sessions with each of the Sections to talk them through Zoom and how to join. Some required a 1-2-1 session but within a week all of the Ladies were online and joining in Zoom sessions. We were already using DropBox to learn our parts and rehearse at home, so this was a huge help. After only an initial 10 week period of in person rehearsals our new MD structured online rehearsals to keep the Ladies attention and make them a

fun event. They have been so successful, we now open up the line 30 minutes earlier for Ladies to meet up for a 'social chat', ahead of rehearsal commencing. We see our members as an extension to our family so are happy to do whatever we can to help with the physical and mental wellbeing.

All we want to do is play together. *There is too great a time lag to be able to do this online.*

*A couple of people lack technology, but **where there is a will there is a way.***

We have very little online relationship with our regular audience (for example, we only have email addresses for ~10% of our mailing list) and could not realistically build an online audience to support live-streamed concerts.

*It's not possible for us to do anything during the day due to work. **We have had a lot of issues around homes being unsuitable for rehearsing in the evenings due to volume,** either self-conscious or just downright nasty neighbours. So even when people are involved, if you don't live in a nice detached house or an environment where evening noise can be tolerated, you are not on as fair a footing as those who do.*

Few people want to sit at home warbling to themselves! *It is also difficult for younger members who are in shared accommodation or in accommodation with close neighbours.*

The whole point of our Club is a truly live performance with musicians playing to an audience in the same room.

7. Barriers to returning in person

The top barrier to returning to in person activity is their members' anxieties – **67% of groups report this now, up from 53% of groups in September 2020.**

59% reference that **many group members are in high or moderate risk categories,** as defined by the NHS.

45% (43%) of groups say that **interpreting government guidelines** as to whether they can get back to in person activities is a barrier. This similar result to September 2020 likely reflects the ever increasing lack of clarity and rapidly changing advice over recent weeks.

Only **21%** (19%) said that **the ability to risk assess and create safe procedures** was a barrier. This might mean that despite Making Music's extensive guidance, this percentage of members simply finds the organizational and resource demands this places on their group too onerous.

10% report that the cost of a Covid-19 secure 'normal' is beyond their finances. And **7%** are concerned that they do not have the volunteers needed to run such a new normal.

51% of groups are hoping to return to their usual rehearsal venue – though **27%** don't yet know (e.g. if their venue is still suitable/will have them back/can be ventilated etc.), and therefore **over 20%** believe they will have to find a new venue – much uncertainty and worry expressed in comments on the topic of venues, especially on:

- size of venues (to accommodate often very large music groups, e.g. 100+ choir or full symphony orchestra)
- schools or other spaces which have a primary purpose which they are focusing on for the foreseeable future
- spaces currently re-purposed as vaccination or testing centres

- lack of certainty about venue availability or processes
- storage of instruments and equipment especially if venue change necessary
- previously used venue has been sold/demolished/redeveloped/closed down due to Covid
- church regulations (Church of England, Methodist, Church of Scotland)

Some of the issues of concern:

- Finding a venue with adequate ventilation (29%)
- Finding a larger venue local to them (25%)
- Venues are slow to respond to discuss arrangements (10%)
- Larger or otherwise more suitable venues are too expensive (9%)
- There aren't enough venues for their need in their area (8%)
- Venues don't have good enough wifi (8%) – e.g. for livestreaming or hybrid rehearsals
- There's a lot of competition for suitable rehearsal venues (7%)

Having surveyed our membership, it is the more elderly who seem to be most eager to get back to in person rehearsals, perhaps from being at home so much (not of working age).

We will send out a questionnaire on how members feel about returning. Concerned that some may not return as they have not played at rehearsals for over a year.

*I do not doubt our group's ability to carry out, for example, the need to assess risks and suitabilities of rehearsal and concert venues as appropriate, or of drawing up protocols/procedures. Like many groups, age profile tends towards being high, and I am not certain **how many of our members will feel confident to return when the time comes.***

We can't wait to return in person and will jump through all the necessary hoops in order to do so safely.

Without a clear plan for how we will return to "normal" it will be hard to persuade people to return to rehearsing and to get them to pay subs necessary to fund rehearsal venue, conductor, music hire etc.

The ability to risk assess will not stop us from returning - it is just difficult!

Need to wait until we can rehearse and perform as normal.

Members have other priorities post lockdown - travel that has had to be postponed, seeing family or friends not seen for a year etc. Choral singing may not be uppermost in their minds.

MM do a great job of explaining the guidelines and it helps the band committee to make our decision to return.

The biggest barrier is not having a road map, like England, with which to plan. We have no timeline for the easing of lockdown restrictions in Wales and returning to rehearsals has never been mentioned, even in passing, by the Welsh government. Do they even know we exist?

I don't think it's right to discriminate against non vaccinated members. It's ageist - they are our younger singers. But actually it's a free country and a few people will not choose to have the vaccination. That's private - and medical, and under GDPR we will NOT be asking who is and who is not vaccinated.

We are having to second guess likely percentage audience return in order to put together a season that does not leave us bankrupt!

8. Return to in person activity

53% of groups plan to return to meeting in person between May (earliest permitted date) and August 2021

32% in September

7% between October and December

8% say 2022 or that they don't yet know

9. Subscriptions and MD payments

37% (38%) of groups are currently not charging their members subscriptions.

19% have made it optional or asked for donations instead.

18% (16%) are charging a reduced or amended rate.

16% (13%) are continuing to charge as normal.

4% never charge subscription.

3% are charging on a different basis (e.g. termly vs annual, pay as you go etc.)

Members were given a breakdown of choir's running costs and the amount needed per person to meet these costs, then asked for a donation per term.

We have offered a reduction for those who wish, and waived fees for those in financial difficulties. Most prefer to contribute the usual amount.

We have not charged for online rehearsals. With no concerts and hiring to fund, no MD to pay and only limited amount to pay our accompanist for running Zoom sessions, our finances are still healthy.

Only those who attend online rehearsals are asked to pay something.

30% (27%) of groups are continuing to pay their MDs the same rate as before lockdown, and a further **15%** (25%) are paying a reduced rate, **1%** an increased rate, and **6%** are now paying them on a different basis (e.g. per rehearsal).

18% (22%) are no longer paying their MDs.

For 21% (26%) this question was 'not applicable' - their MD may be an unpaid volunteer, or they don't have an MD.

10. Financial impact and implications for group

In terms of groups' financial health, **82%** (76%) say they feel like their group is stable for the next 12 months.

17% (22%) describe their situation as concerning, they're ok for now but not for much longer, and only **1%** (2%) are now financially unstable and of immediate serious concern.

In their current financial year, 78% of groups expect their income to be below £7,200 (compared to approx.. 46% of groups in a 'normal' year). By their next financial year, only

62% of groups expect their income to be so low, so they hope to be on the way to recovery.

11. Making Music support and resources

Most useful resources of the last year:

65% - risk assessments

55% - resources to help them plan a return to in person activity

36% - research information, collating scientific and medical evidence.

14% - resources to help with Zoom and other online activity

14% - case studies and blogs on Covid secure rehearsals and performances

9% - resources about livestreaming

8% - resources about creating a virtual performance

5% - resources to help plan financially

In additional free text, the most frequent mentions in 88 comments were of:

- Our guidance tool/interpretation and clarification of government guidelines (25x)
- Our online events programme (23x)
- Our lobbying work (3x)

What groups would like us to focus on this year:

Interpreting regulations know government advice think already orchestra particularly
change many Clear guidance funding planning Interpretation etc resources
rehearsals concerts person back recruiting new members safely issues
activities singers information available
Interpretation government guidelines see make risks
safe date rehearsals performances
Interpreting government guidelines Keep government guidelines return
great help support members regarding Continue small
guidelines best practice groups useful
guidance Anything advice ideas
risk assessments performing rehearsals
info Updates Recruitment concerts possible need found
Covid Continue advice choirs use audience best
performances covered sure attend events going singing
Encouraging restrictions keeping us date also Zoom helpful together Will Thank
Clear complying online specific venues sharing meet re detail return rehearsals safety
interpreting government guidance government guidance apply way rules

Final comments – topics or issues for Making Music to consider (a representative sample):

We do feel as though amateur music making is one of the last things that will be allowed to return and that seems very unfair. There may be problems with the public understanding this, thinking that it is a dangerous activity, whereas if we all follow the rules it will be safe. Publicity around this might be helpful.

Thank you again, really appreciate all your hard work and perseverance on behalf of music groups. It is very reassuring to have your guidance, rather than try and decipher the government guidance on our own.

We have kept up our morale by meeting on zoom and will survive.

Following lack of employment due to Covid our young self-employed MD has decided to look for permanent employment outside of the Music industry and will not be continuing as our MD. The sixth form college where we have rehearsed for a number of years is no longer able to accommodate us so we have currently no MD or venue.

Very appreciative of the help you have provided, including webinars.

There is a very thin line between a small group like ours continuing, under Covid related conditions, and folding.

Just to say that we are incredibly grateful to MM for everything they've done so far - most valuable was the lobbying of various government people to get clarity on the restrictions; and the very thorough and comprehensive template risk assessments, which we have totally relied on to be able to put on our two events at the end of last year.

We will survive to play another tune!

It's great to have Making Music as a first port of call for all sorts of advice and as our advocate in the wider world - THANK YOU!!

DCMS understanding the importance of amateur music-making as an income for freelance musicians and a crucial well-being activity for a large part of the population, Making Music has been brilliant at trying to do that and having your support has made a very challenging year slightly improved - thank you.

We are so looking forward to returning to singing and playing, rehearsal and performance.

We are running out of material to sing on Zoom.

It is now difficult to imagine getting back to normal.

It has been useful to be part of this organisation. We are not alone in our efforts to keep music going.

...thank you for being there.

MM is really proving its worth! Thank you.

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