

Results from SFEMS Survey

May 2020



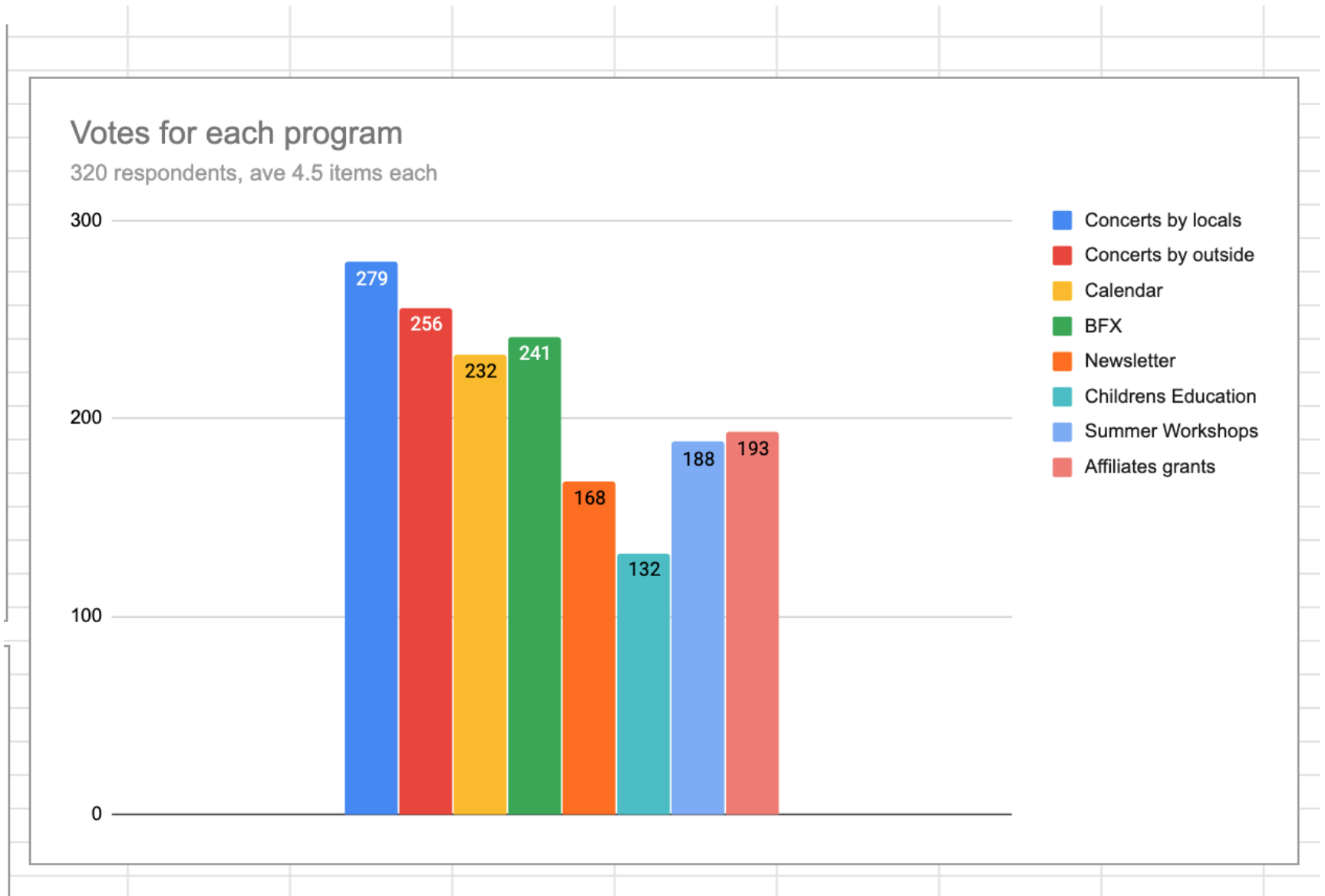
SFEMS Survey – May 2020

- SFEMS published an online survey to help the Board and staff make decisions about how best to support our mission in the face of pandemic-related restrictions
- Our survey was only 6 questions – mostly multiple-choice, but with opportunity for comments also
- The survey was publicized via direct emails and our weekly email newsletter
- This summary of results was prepared on 5/25/2020

Analysis of Survey Results

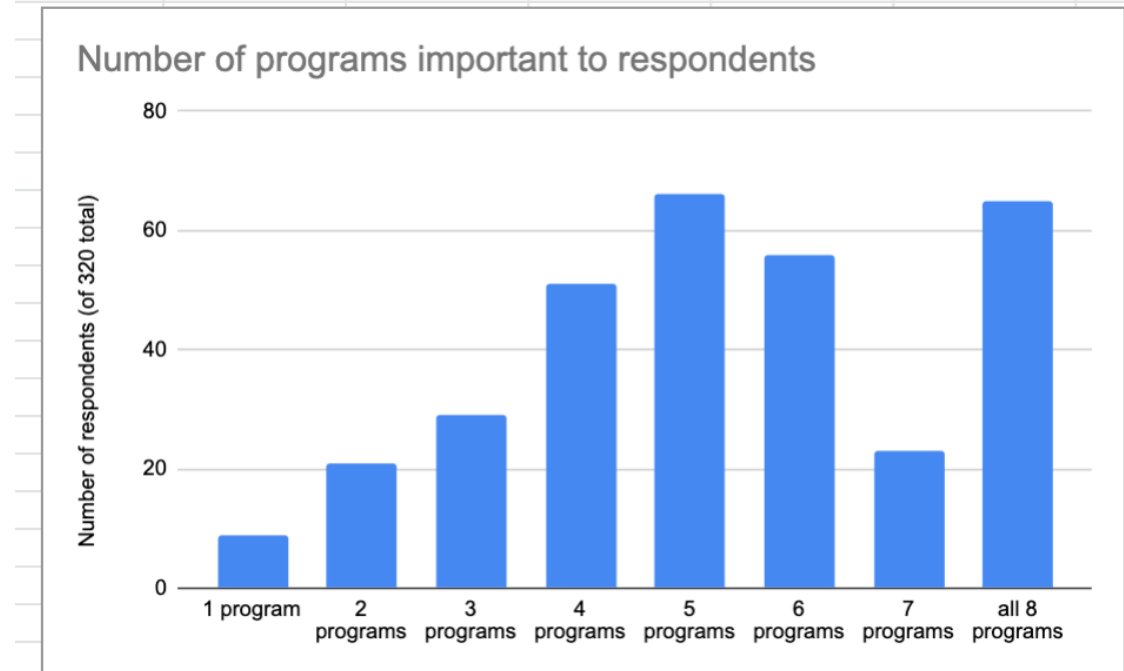
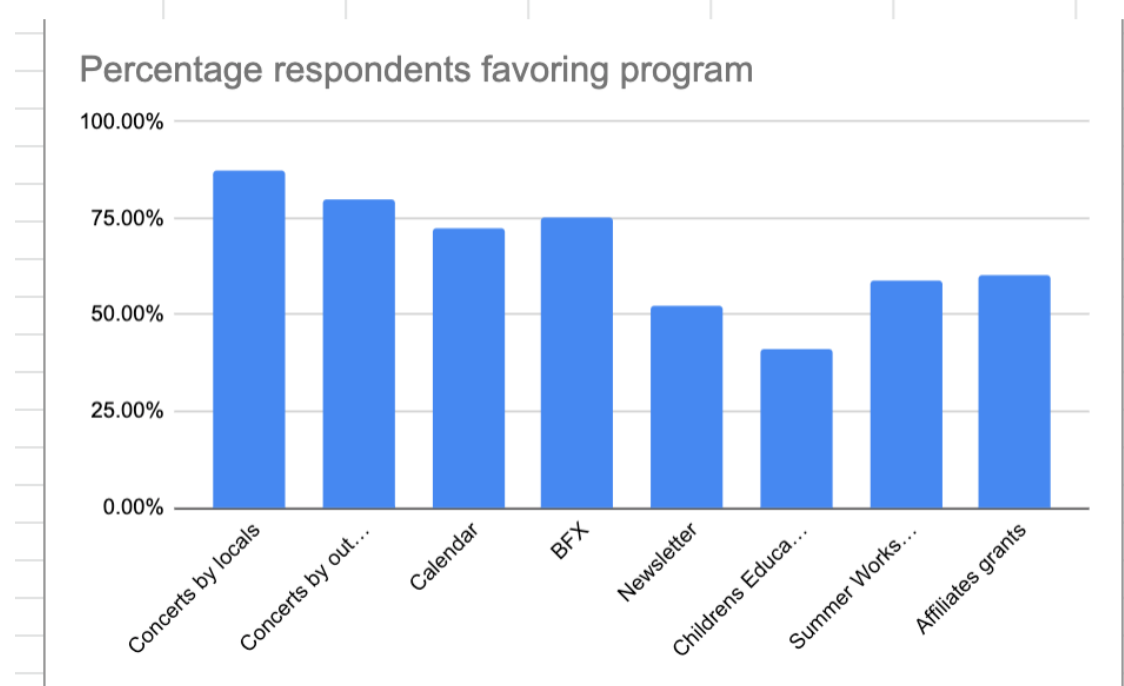
- One of the most impressive results is the number of responses: 320
 - This number represents something like a 10% response rate for all who were notified of the survey – which is very high
 - We probably received responses from between 25% and 50% of our members – again, very high
 - We did not ask our anonymous respondents to provide their membership status
- Analysis: based on the response rate, it seems that SFEMS matters to the local early music community

Q1: Which SFEMS Programs Do You Value?



Q1: Which SFEMS Programs Do You Value? (cont.)

(Same information, but percentages instead of counts. Also, how many programs respondents consider important)



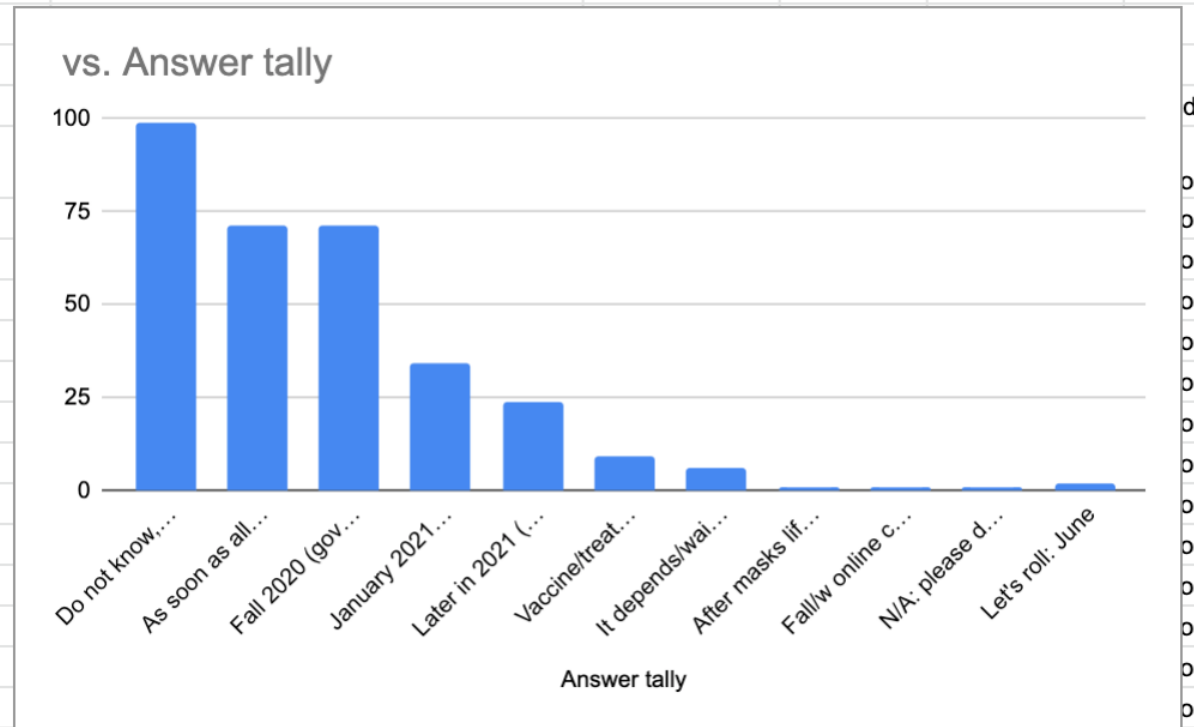
Q1: Analysis

- Hard to draw firm conclusions – too many factors, too few data points. Still, it appears that:
 - Concerts are at the top of the list, especially by locals
 - Many people want most or all programs to continue
- Some possible factors affecting answers:
 - Online workshop participation has been high (nearly 300 students) but many are from out of town and therefore might not be represented in the survey
 - It's possible that many local musicians participated in the survey, which would impact some results
 - Affiliates & MDW probably have relatively low visibility
- If concert interest is this strong, why isn't normal concert attendance higher?!

Q2: When Will You be Ready for Live Concerts?

A detail view of the responses...

concerts ?	
Answer tally	
Do not know, but probably not soon.	99
As soon as all restrictions are lifted.	71
Fall 2020 (government guidelines allowing for d	71
January 2021 (government guidelines allowing	34
Later in 2021 (government guidelines allowing f	24
<i>Vaccine/treatment</i>	9
<i>It depends/wait see</i>	6
<i>After masks lifted</i>	1
<i>Fall/w online contingency</i>	1
<i>N/A: please do online concerts</i>	1
<i>Let's roll: June</i>	2
Total responses	319

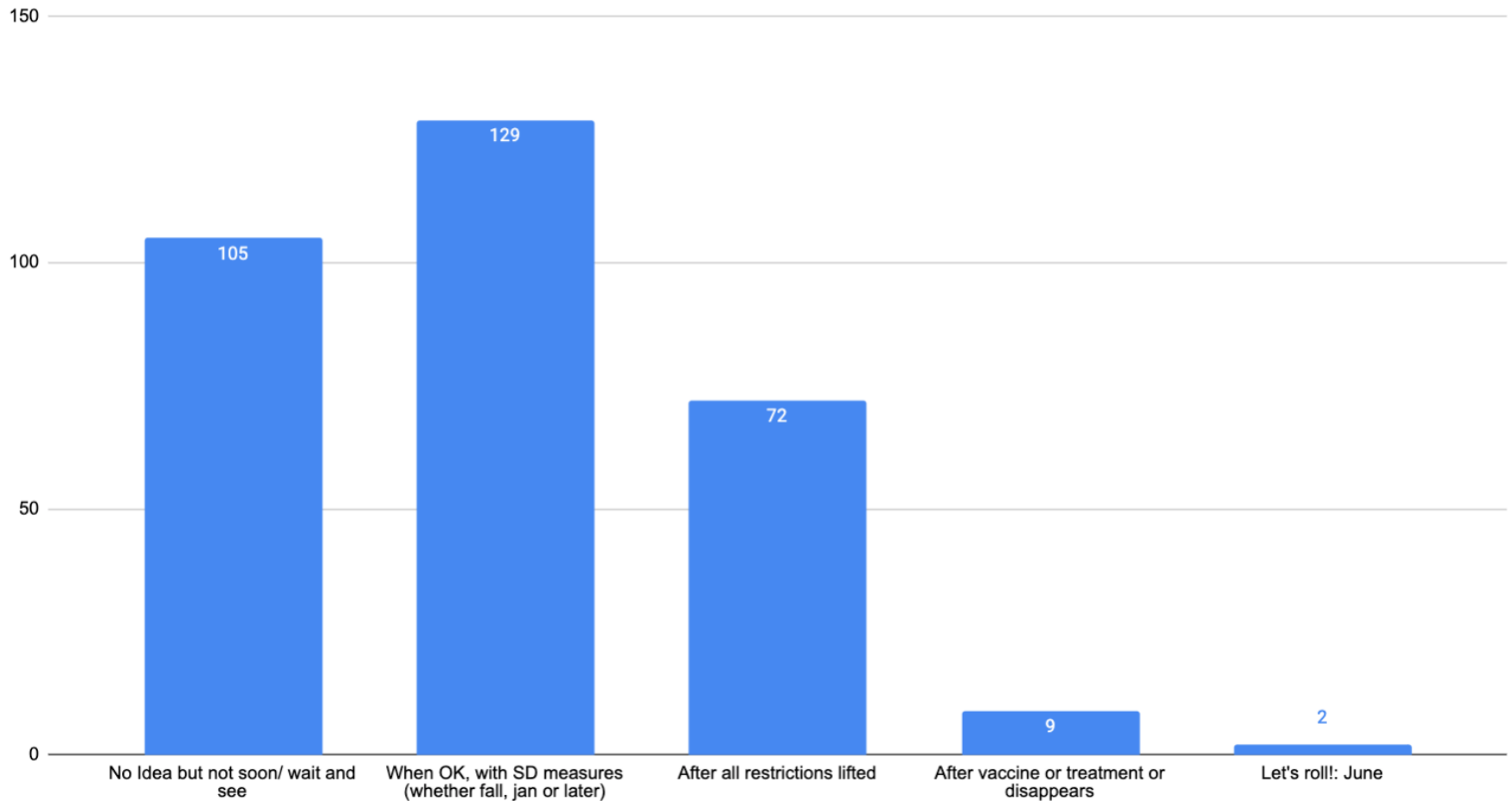


As so

Q2: When Will You be Ready for Live Concerts?

When will people return to live concerts?
(of 317 respondents)

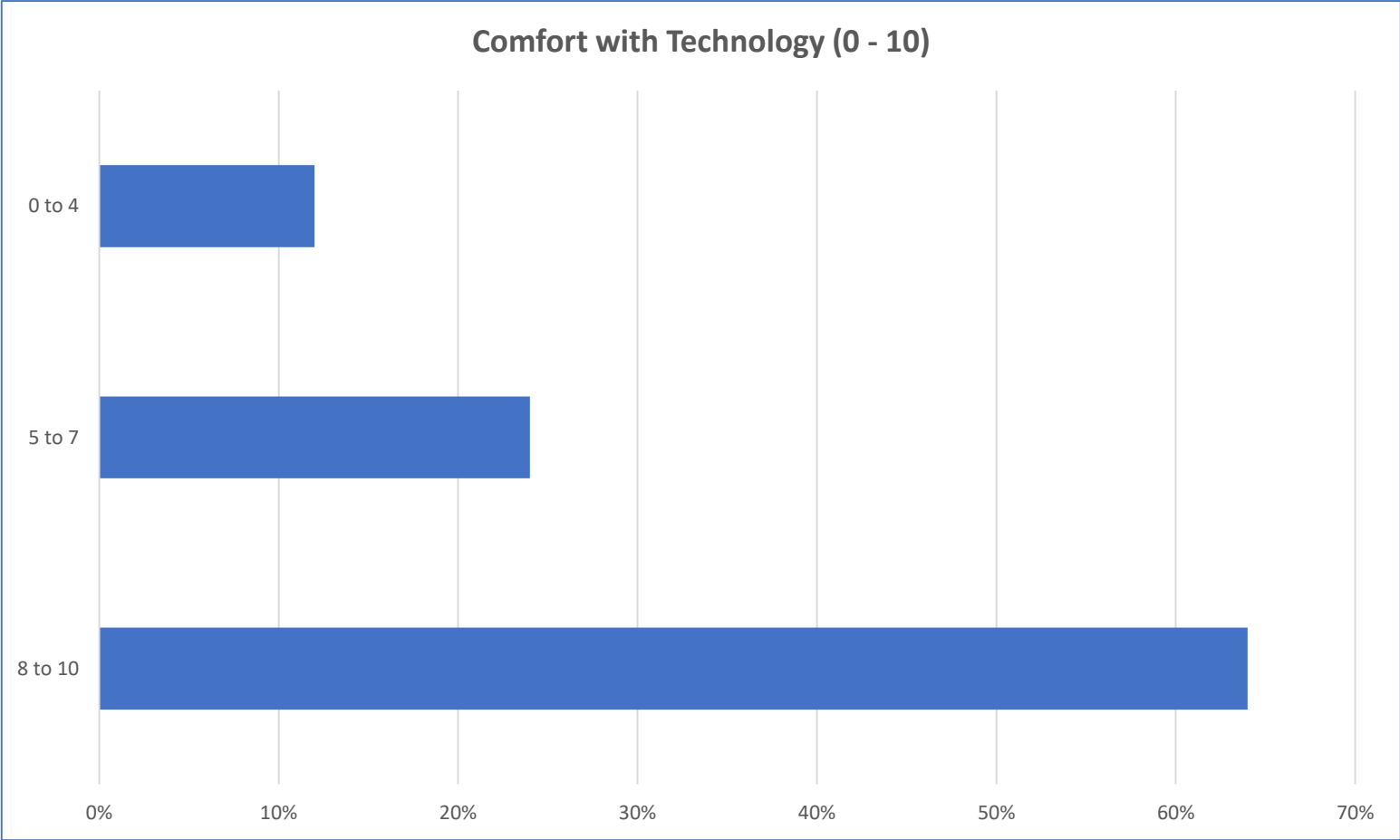
A summary view of the responses...



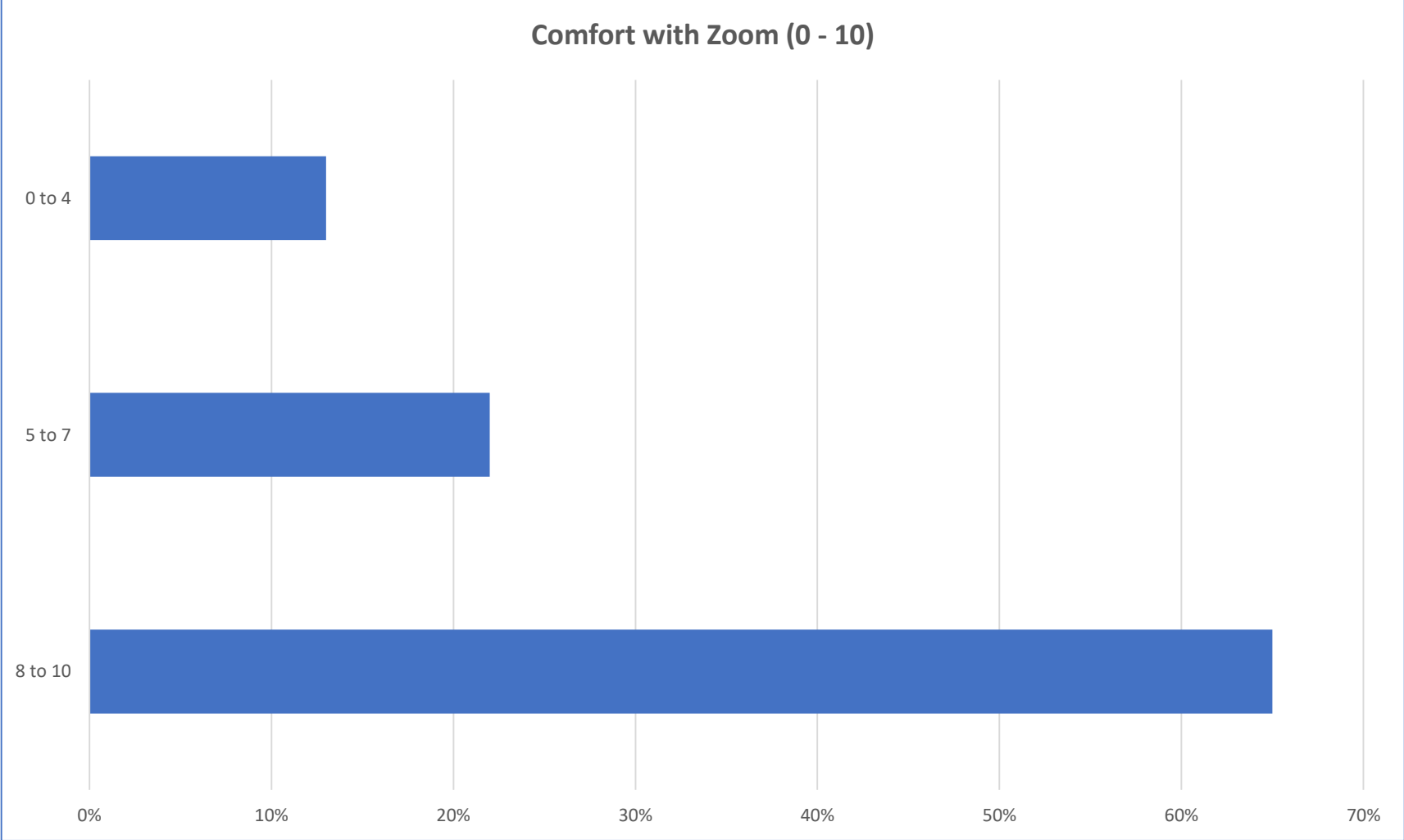
Q2: Analysis

- Based on these results, we should probably not plan on live performances for Fall 2020
 - A sizeable percentage of our audience says “not soon”. Others say “when restrictions lifted”, but we know that reimposition is possible even after initial lifting
 - The results seem to show that at best 40% of our audience would be ready for live performances by Fall. We need closer to 80% for live shows to be viable
 - Venue size will also be an issue if social distancing is still required
- The outlook for Spring 2021 is murkier. Prospects seem better for late Spring, but still unknown

Q3: How Familiar Are You With Technology?



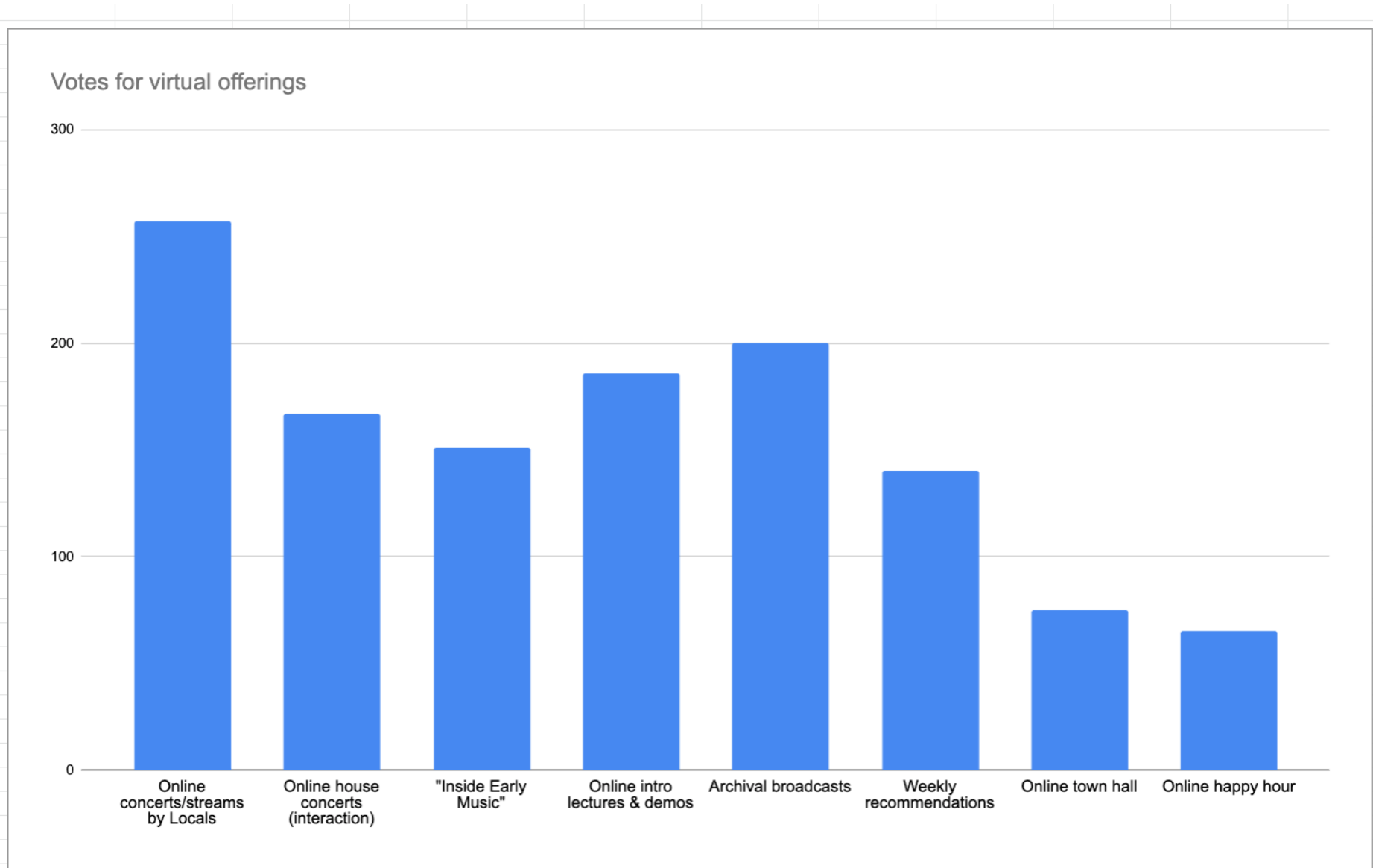
Q4: How Comfortable Are You With Zoom?



Q3/Q4: Analysis

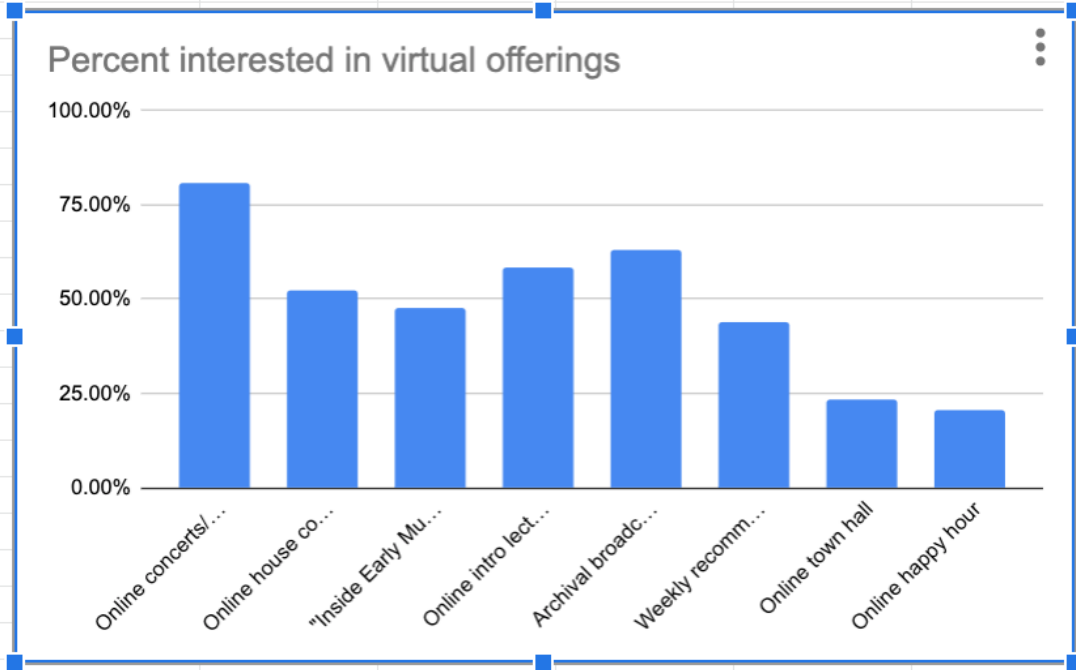
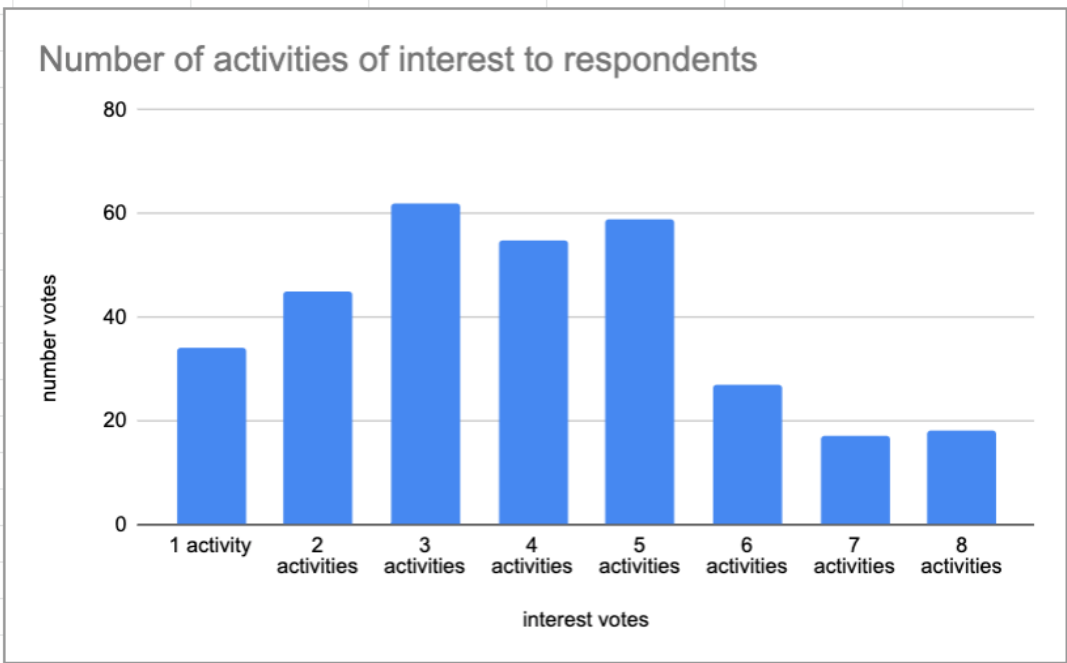
- Most of our respondents self-rate as relatively proficient (8 to 10 out of 10) on using technology
- This is consistent with what we've seen with the online workshops
 - Participants (and some instructors) have had some issues, but competence with technology has mostly not been a problem
 - SFEMS has held training sessions for users, and these have been helpful

Q5: What Alternatives Would You Like to See?



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(Same information, but percentages instead of counts. Also, how many types of programs respondents are interested in)



Q5: Analysis

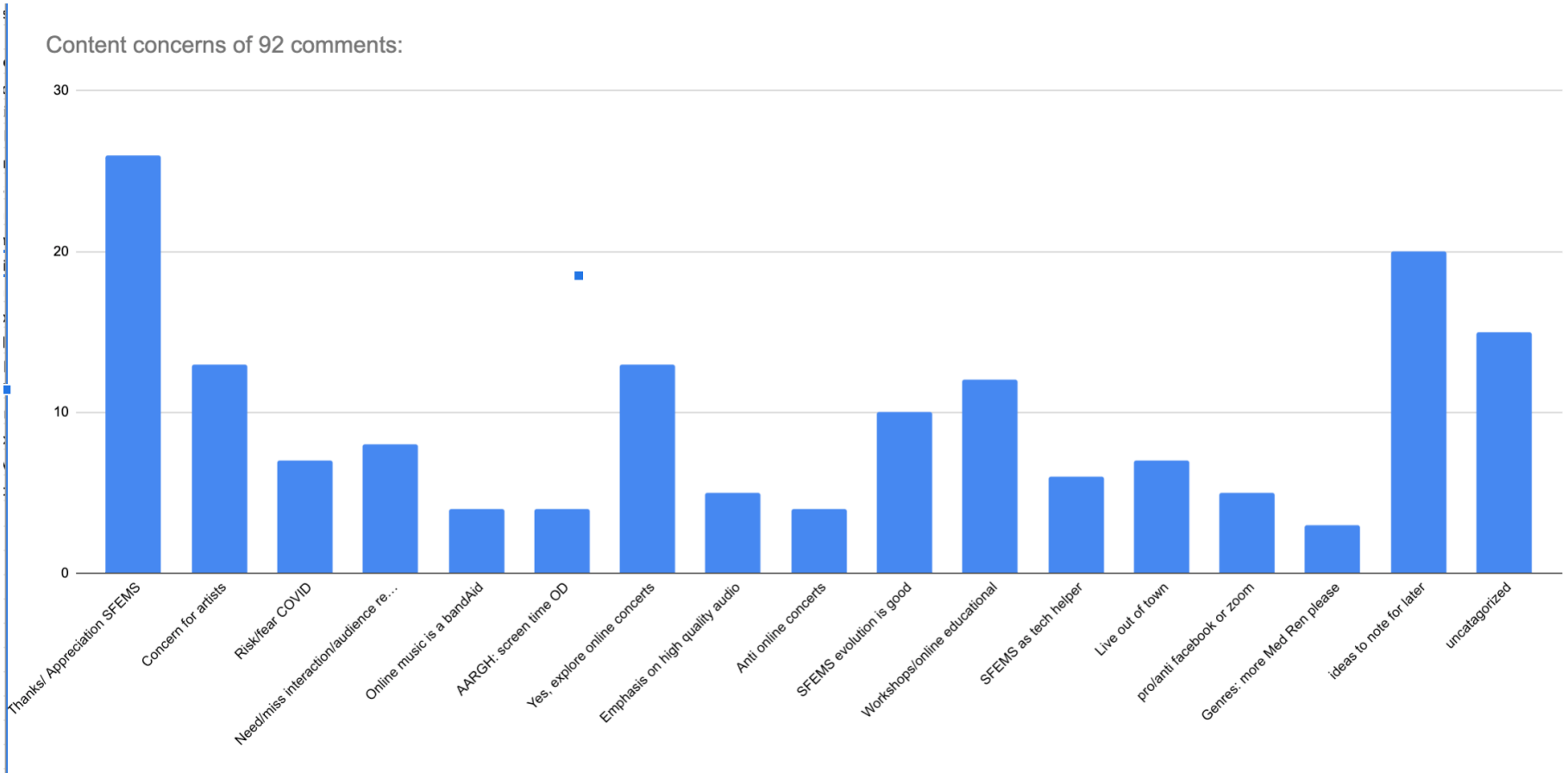
- Concerts or concert-like presentations (live, archival, lecture/demonstrations) top the list of potential virtual offerings (over 50% support)
- Other variants (e.g., interactive events, interviews) have enough interest to be considered
- Many respondents are interested in multiple kinds of online events

Q6: Comments

- A large percentage of respondents (close to a third) added their own comments and suggestions
- Many respondents expressed thanks to SFEMS for its efforts to keep music alive during this time
- Free-form comments are not easily quantifiable, but we have tried to group them as identified in the following slides

Q6: Comments Categorized

Content concerns of 92 comments:



Q6: Selected Comments

Q6: Importance of social aspects of a concert

- Unfortunately, there's no real substitute for live performances with an audience responding.
- I find the energy of live music completely different from that of recordings or online options
- I miss the "feel" and camaraderie of live performance, especially in the company of like-minded acquaintances I see only at SFEMS.
- Live music cannot be replicated online. The whole point of live music is interaction and community.
- While I'm comfortable using technology, so much of early music for me is the in-person experience. Maybe it's possible in not too much longer to do socially distanced concerts, where people are just sitting further apart.

Q6: Selected Comments

Q6: Concerns for Musicians

- It is important to help the musicians retain a presence with their fans and audiences. Nevertheless, livestream concerts are generally not very satisfying to me unless there is an extremely high quality audio feed. Few platforms offer that.
- I am immensely sad that at a time like this, when artists are unable to play for the public, the public needs them the most. I am also sad that it's a time of restricted finances for myself and others who might otherwise contribute financially.
- We highly value "feeding the pipeline" to expose awareness among potential future performers and audiences, and enabling aspiring performers with concert/recital opportunities in order to cultivate and sustain a first-rate performance communi
- To support our local talent and also for logistics, it may be better to leverage all the great local talent in the short term. If we can't restart for the usual season, perhaps there could be a mini-festival in spring if the pandemic is under sufficient control.
- I really miss the SFEMS concerts and that of their affiliates. My heart goes out to the many talented musicians having to manage their career during this crisis.

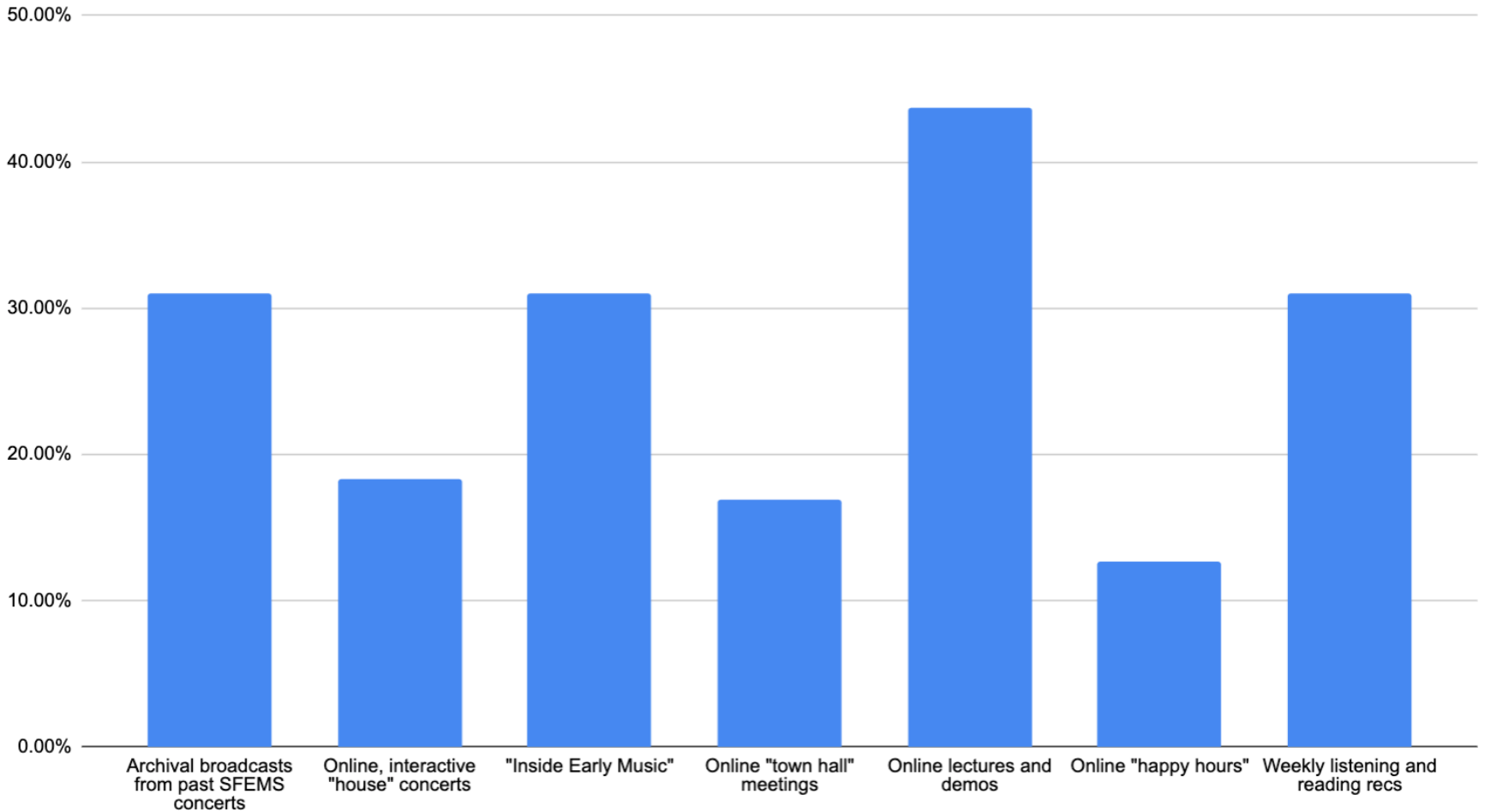
Q6: Selected Comments

Q6: SFEMS evolution is good!

- I don't see public events..returning any time soon.. This will mean that SFEMS will need to embrace the virtual event model for everything it does.. it's important to maintain a presence. Some new normal will eventually evolve. SFEMS should be there.
- Thank YOU for all you do to make music accessible to all of us at this time.
- I am very grateful for any ideas that keep early music alive in our community! Thank you for being creative!
- a rousing round of applause for the inaugural online workshop session with Adam Gilbert! With 62 participants (including hosts) it was a thrilling introduction to how wonderful this kind of learning can be. A standing ovation to Stacey and Derek for getting this program up and running so quickly and successfully. And bravo to Adam for such a great class. I only wish it could have been a 2-hour session.
- I don't live in the Bay Area and my local area only has limited early music, so the whole virtual thing allows me to participate in a way that I can't otherwise.
- I love the idea of continuing to offer online learning and playing sessions even after isolation. We could draw a larger audience and enhance in person sessions, too. I argue for a hybrid future that includes both in person and online. I can imagine having one or more online sessions and then meeting in person (if and when possible) to work together. I also think SFEMS MedRen could be a great way for me to archive and share my and other peoples' teaching material on Renaissance music.

Q6: Alternatives to Online Concerts

Q5 Online activity interests (for people that don't want concerts; 71 of 320 people)



Next Steps

- SFEMS' Board and staff will take the survey results into account while considering:
 - Programs to present for the upcoming 2020 – 2021 season
 - Longer-term changes for how SFEMS fulfills its mission in a post-COVID world