CMA Survey Summary
The Impact of COVID-19 on the Small Ensemble Music Field
June 2021

View Summaries of CMA’s Previous COVID-19 Impact Surveys
April 2020 | June 2020

This report has been published in partnership with the Wallace Foundation’s "Building Audiences for the Arts" initiative.
We are pleased to present the results of Chamber Music America’s third survey regarding the effects of the COVID-19 pandemic on the small ensemble music field. Previous survey results were published in April and June 2020, long before vaccines were available and venues were considering reopening. And while the end appears to be in sight, our field still has some distance to cover to return to the pre-pandemic level of music activity.

The survey was distributed to 8,500 email addresses, closed May 14, and received a 4.4% response rate.

Among our findings:

• While more than 50% of ensemble respondents have returned to in-person performances, only 37% of independent artists are performing with live audiences.

• Slightly more than half of the respondents have been able to monetize digital events, but greater response was achieved through donations rather than ticket sales.

• 50% of ensembles and presenting organizations plan to continue using remote technology in addition to live performances, and 64% of independent artists are even more enthusiastic about its possibilities.

• Overall, everyone is eager to return to live performances, but many respondents expressed fear about adequate safety measures in place.

We hope that this information will help you better understand how our community has fared and is recovering, and where you are among your colleagues in the field.

We are grateful to the Wallace Foundation for helping to make CMA’s data collection possible, and we thank all those who participated in the surveys.

Margaret M. Lioi
Chief Executive Officer
Survey Respondents

What do our respondents do?

<table>
<thead>
<tr>
<th>Respondent Type</th>
<th>Responses (378 total)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Musician</td>
<td>91</td>
</tr>
<tr>
<td>Ensemble</td>
<td>88</td>
</tr>
<tr>
<td>Presenter</td>
<td>82</td>
</tr>
<tr>
<td>Composer</td>
<td>44</td>
</tr>
<tr>
<td>Educator</td>
<td>20</td>
</tr>
<tr>
<td>Artist Manager</td>
<td>17</td>
</tr>
<tr>
<td>Festival</td>
<td>15</td>
</tr>
<tr>
<td>Other Music Business</td>
<td>14</td>
</tr>
<tr>
<td>Music School / Training Program</td>
<td>7</td>
</tr>
</tbody>
</table>

Styles of Chamber Music Represented

<table>
<thead>
<tr>
<th>Musical Styles</th>
<th>Ensembles</th>
<th>Individuals</th>
<th>Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Early Music</td>
<td>10</td>
<td>27</td>
<td>57</td>
</tr>
<tr>
<td>Eastern and/or Western Classical/Contemporary</td>
<td>97</td>
<td>141</td>
<td>200</td>
</tr>
<tr>
<td>Traditional, Contemporary, and/or Avant Garde Jazz</td>
<td>33</td>
<td>86</td>
<td>56</td>
</tr>
<tr>
<td>Tradition not represented in this list</td>
<td>13</td>
<td>24</td>
<td>16</td>
</tr>
</tbody>
</table>
Survey Respondents Age and Location

How old are our respondents?*

*Only respondents who identified as “Ensemble Members” or “Individuals” [Composers, Educators, & Independent Musicians] were asked for their age. Respondents who identified as or represented Artist Managers, Festivals, Music Businesses, and Music Schools/Training Programs were not asked this question.

Where are our respondents located?**

<table>
<thead>
<tr>
<th>States with Highest # of Responses</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York</td>
<td>100</td>
</tr>
<tr>
<td>California</td>
<td>51</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>26</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>17</td>
</tr>
<tr>
<td>New Jersey</td>
<td>14</td>
</tr>
<tr>
<td>Texas</td>
<td>11</td>
</tr>
</tbody>
</table>

Responses were received from 37 states, the District of Columbia, and Puerto Rico. Eight responses were received from outside the US.

**The other 31 states each received fewer than 10 responses.
In keeping with its Commitment to Diversity, Inclusion, and Equity, CMA seeks to understand the demographics of its membership and of the members who access its benefits and services. In this report summary CMA uses the terms ALAANA (African/Black, Latinx, Asian/South Asian, Arab/Middle Eastern, Native American) and White to identify race.

How do our respondents racially identify?*

*Only respondents who identified as "Ensemble Members" or "Individuals" [Composers, Educators, & Independent Musicians] were asked for their race. Respondents who identified as or represented Artist Managers, Festivals, Music Businesses, and Music Schools/Training Programs were not asked this question.
Survey Respondents Gender

*Only respondents who identified as "Ensemble Members" or "Individuals" [Composers, Educators, & Independent Musicians] were asked for their gender. Respondents who identified as or represented Artist Managers, Festivals, Music Businesses, and Music Schools/Training Programs were not asked this question.*
Survey Respondents: Organizational Budgets and Legal Status

**Organizational Budgets - # of Responses**

- Less than $100,000: 37.78%
- $100,000 - $249,999: 20.74%
- $250,000 - $499,999: 8.15%
- $500,000 - $999,999: 13.33%
- $1,000,000+: 20%

**Legal Status - # of Responses**

- Nonprofit: 83.7%
- Unincorporated Sole Proprietorship or Partnership: 6.67%
- For-Profit Corporation: 5.19%
- Other: 4.44%

*Only organizations were asked about their budgets or legal status.*
**Key Findings**

**In-person/live performances:**

- More than half of Ensemble and Organizational respondents **have begun performing/presenting in-person performances.** Individual artists lag behind at 37%.
- Of those not currently performing, nearly half of Ensembles and Organizations **expect to return to live performances in the fall (September - December 2021).** Individual artists have more uncertainty.
- Respondents are experimenting with **hybrid performances/lower-priced admissions** to bring audiences back.

**Overall, respondents are eager to return to live performances, however:**

- Many have expressed **anxieties regarding safety.**
- Respondents are expressing **uncertainties on whether their income will return to pre-pandemic levels.**

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**CARES Act Funding:**

- Over 60% of respondent Individuals and Organizations received CARES Act funding of some sort, versus less than 40% of Ensembles.
- Majority of those who received funding have already spent all CARES money (just under or over 80%).

**American Rescue Plan (ARP) Funding:**

- The majority of individual respondents have already received some form of ARP funding (most likely Pandemic Unemployment Assistance [PUA]).
- It’s too early to report on Organizations and Ensembles, since some programs have yet to begin disbursement (i.e. Shuttered Venue Operators Grants [SVOG]).
Key Findings (Con't)

Remote Technology:

• Organizations had the most capacity to utilize remote technology to produce events (88%), followed by Individuals (83%) and Ensembles (74%).

• Remote technology is used for all kinds of activities (performances, workshops, webinars, artist interviews, etc.).

• 25 different streaming technology/platforms (not including Zoom, YouTube, and Facebook/Instagram) were mentioned by all respondents.

• Individuals are most enthusiastic to continue using remote technology (64%). Slightly more than half of Ensembles and Organizations plan to continue when live performances return.

Monetization & Economic Support:

• Slightly more than half of survey respondents have been able to monetize remote events.

• Some mentioned that ticketed events don't yield as much monetary support as suggested donations.

• Several respondents stressed that even though they were able to monetize, revenues from remote activities are lower compared to in-person activities.

• Several organizations report receiving funding from board members, subscribers, and audiences have all stepped up and that individual giving has been higher than previous years.

• In contrast, some organizations lost corporate sponsorships and don’t think those will come back post-pandemic.
In Person Performance

Are you currently performing/presenting/booking in-person performances? (All Respondents)

- Yes: 47.9%
- No: 52.1%

If not, when do you anticipate beginning to perform/present/book in-person concerts again?

- June - August 2021: 19.5%
- September - December 2021: 25.6%
- January - May 2022: 43.6%
- I don’t know: 11.3%
## Relief and Recovery Funding Federal Programs (CARES and ARP)

### CARES Act Funding

<table>
<thead>
<tr>
<th>Answer</th>
<th>Ensembles</th>
<th>Individuals</th>
<th>Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received CARES Funding</td>
<td>35</td>
<td>93</td>
<td>83</td>
</tr>
<tr>
<td>Did Not Receive CARES funding</td>
<td>36</td>
<td>43</td>
<td>32</td>
</tr>
<tr>
<td>Not Eligible</td>
<td>17</td>
<td>19</td>
<td>20</td>
</tr>
</tbody>
</table>

28 Ensemble Respondents (80% of those funded) reported that they have spent **all of their CARES Act funding.**

17 ensembles (19% of respondents) experienced layoffs or furloughs; 4 positions were reinstated.

79 Individual Respondents (85% of those funded) reported that they have spent **all of their CARES Act funding.**

Individuals were not asked about layoffs or furloughs.

64 Organization Respondents (77% of those funded) reported that they have spent **all of their CARES Act funding.**

35 organizations (26% of respondents) experienced layoffs or furloughs; 14 positions (42.5% of organizational layoffs or furloughs) were reinstated, 19 were not (57.6%).

### American Rescue Plan (ARP) Funding

<table>
<thead>
<tr>
<th>Answer</th>
<th>Ensembles</th>
<th>Individuals</th>
<th>Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received ARP Funding</td>
<td>29</td>
<td>83</td>
<td>42</td>
</tr>
<tr>
<td>Did Not Receive ARP funding</td>
<td>43</td>
<td>52</td>
<td>47</td>
</tr>
<tr>
<td>Applied, but have not received ...</td>
<td>1</td>
<td>4</td>
<td>20</td>
</tr>
<tr>
<td>Planning to Apply in the Future</td>
<td>2</td>
<td>0</td>
<td>19</td>
</tr>
<tr>
<td>Not Eligible</td>
<td>13</td>
<td>16</td>
<td>7</td>
</tr>
</tbody>
</table>
Respondents received funding from a variety of non-government sources.

<table>
<thead>
<tr>
<th>Funding Source</th>
<th>Ensembles</th>
<th>Individuals</th>
<th>Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>COVID-19 Emergency Relief Funds</td>
<td>7</td>
<td>27</td>
<td>28</td>
</tr>
<tr>
<td>Corporations</td>
<td>1</td>
<td>0</td>
<td>15</td>
</tr>
<tr>
<td>Private Foundations</td>
<td>10</td>
<td>13</td>
<td>49</td>
</tr>
<tr>
<td>Crowdsourcing Campaigns</td>
<td>3</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>4</td>
<td>10</td>
</tr>
<tr>
<td>Applied, but Did Not Receive Funding</td>
<td>3</td>
<td>11</td>
<td>4</td>
</tr>
<tr>
<td>Did Not Seek Additional Funding</td>
<td>54</td>
<td>102</td>
<td>53</td>
</tr>
</tbody>
</table>
Remote Technology Current Usage

Ensemble Usage
- Has used/plans to utilize remote technology: 73.9%
- Does not have the infrastructure: 15.9%
- No Remote Technology: 10.2%

Individual Usage
- Has used/plans to utilize remote technology: 83.5%
- Does not have the infrastructure (3.8%)
- Other Responses (5.7%)

Organizational Usage
- Has used/plans to utilize remote technology: 88.1%
- No Remote Technology: 7.6%
- Does not have the infrastructure (4.24%)
Remote Technology: Future Usage

**Ensemble Usage**
- Plans to Use Remote Technology in the Future: 52.3%
- Unsure About Future Remote Technology Use: 44.6%
- Will Not Use Remote Technology in the Future: 3.1%

**Individual Usage**
- Plans to Use Remote Technology in the Future: 64.1%
- Unsure About Future Remote Technology Use: 29%
- Will Not Use Remote Technology in the Future: 6.9%

**Organizational Usage**
- Plans to Use Remote Technology in the Future: 55.9%
- Unsure About Future Remote Technology Use: 28.4%
- Will Not Use Remote Technology in the Future: 15.7%

(Chamber Music America logo)
## Remote Technology

### Event Types and Frequently Used Platforms

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Ensembles</th>
<th>Individuals</th>
<th>Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concerts/Performances</td>
<td>58</td>
<td>94</td>
<td>100</td>
</tr>
<tr>
<td>Artist Interviews/Discussions</td>
<td>39</td>
<td>null</td>
<td>74</td>
</tr>
<tr>
<td>Webinars/Workshops</td>
<td>29</td>
<td>69</td>
<td>43</td>
</tr>
<tr>
<td>Town Halls/Virtual Gatherings</td>
<td>11</td>
<td>null</td>
<td>20</td>
</tr>
<tr>
<td>Private Lessons</td>
<td>null</td>
<td>99</td>
<td>null</td>
</tr>
<tr>
<td>Other</td>
<td>12</td>
<td>22</td>
<td>12</td>
</tr>
</tbody>
</table>

*Only Individuals were asked about private lessons, while only Ensembles and Organizations were asked about Artist Interviews/Discussions and Town Halls/Virtual Gatherings.

### Platforms Used by Respondents

<table>
<thead>
<tr>
<th>Platform</th>
<th>Ensembles</th>
<th>Individuals</th>
<th>Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zoom</td>
<td>50</td>
<td>125</td>
<td>71</td>
</tr>
<tr>
<td>YouTube</td>
<td>47</td>
<td>56</td>
<td>75</td>
</tr>
<tr>
<td>Facebook / Instagram</td>
<td>35</td>
<td>43</td>
<td>48</td>
</tr>
<tr>
<td>Other</td>
<td>12</td>
<td>22</td>
<td>38</td>
</tr>
</tbody>
</table>

Other platforms include: JamKazam, FaceTime, Skype, Go To Meeting, Google Meet, Twitch, Acapella, Vimeo, Crowdcast, A440.live, StageStream Live, Patreon, University/School website, MicrosoftTeams, OurConcerts.live, MediciTV, Yardstream, Cable TV, On The Stage, private websites, Stagelt, Teachable, Soundtrap.
### Successfully Monetized Events*

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Ensembles</th>
<th>Individuals</th>
<th>Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concerts/Performances</td>
<td>35</td>
<td>44</td>
<td>19</td>
</tr>
<tr>
<td>Artist Interviews/Discussions</td>
<td>11</td>
<td>null</td>
<td>2</td>
</tr>
<tr>
<td>Webinars/Workshops</td>
<td>18</td>
<td>27</td>
<td>6</td>
</tr>
<tr>
<td>Town Halls/Virtual Gatherings</td>
<td>1</td>
<td>null</td>
<td>1</td>
</tr>
<tr>
<td>Private Lessons</td>
<td>null</td>
<td>50</td>
<td>null</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>7</td>
<td>1</td>
</tr>
</tbody>
</table>

*Only Individuals were asked about private lessons, while only Ensembles and Organizations were asked about Artist Interviews/Discussions and Town Halls/Virtual Gatherings.

### Ability to Monetize Virtual Activities/Events

- 56% of ensembles
- 50.4% of individuals
- 58% of organizations
What Ensembles Shared

“We have not and do not plan to charge for these streaming events, but we have asked for and received donations from some people attending. These range from a regular ticket price (like $20 or $50) to a few more generous $200 - 250 donations.”

“The performance fee structures and travel costs and logistics are also very difficult to project. We think that online performances or a blend of online and in person performers will be part of our future. It is a way to lower costs for collaborative work with artists that aren't local and help lower our carbon footprint. There are interesting possibilities for creating compelling digital works that may help increase audience awareness of our music.”

“Over the past 30 years, our Latin jazz band has performed 100 to 150 events annually. During 2020, the Covid pandemic year, we performed 13 events -- 8 before the pandemic, 3 virtual concerts, and 2 live events. (After each live event, because the host/client/employer did NOT provide reasonable COVID safeguards, I felt compelled to quarantine myself for 2 weeks.)

“We were able to quickly adapt to the need for virtual programming. Since we are a small company that does everything in house, we just kept trucking along. In a way, the pandemic gave us a leg up on more established companies who weren't able to or willing to adapt as quickly. It helped level the playing field a bit.”

“While the pandemic has been extremely difficult, we appreciate learning so much about video recording and editing, and video broadcasts. It's been a steep learning curve, but rewarding in the long run.”

“Nothing replaces the energy of the live audience. Nothing replaces the experience of live performance. Virtual performances have been vital during the pandemic: They kept our quartet accessible by our audience, we were able to expand the reach of our concerts to a much broader audience through virtual events, and through regular performances our artistic and musical souls were engaged and alive during the pandemic. Unfortunately, virtual events haven't proved to be a large source of earned income in comparison to in-person events. I hope that the availability of vaccines allows us all to return to full houses again.”

“One challenge for next season is that presenting in-person and high-quality online performances increases our performance costs and we can't predict how ticket revenue will play out to help defray additional costs for live stream/video technology services.”

“We had to invest seriously financially in equipment, in order to be able to create good online content with which listeners were willing to engage, and we haven't been able to earn back that financial investment because of the difficulties with performing during this time.”

“We sought funding from foundations and individuals because - other than federal programs - the vast majority of COVID relief funding for artists was applicable only to artists at an individual level: folks who are freelancers or laid off from their work due to COVID. For us, a small NFP who never formally laid ourselves off during this time, it meant that we were very limited in the number of artist-specific COVID relief programs we were eligible to apply for.”
What Individuals Shared
Composers, Educators, & Independent Musicians

"I've been impressed at how we've adapted to online performances, however they don't replace live music. I like to support my colleagues, however I find that after a year I've become screen weary and my attention wanders."

"It's been difficult for artists and presenters, even with things opening up again, the presenters can only accommodate a limited amount of people if the events are inside. Many of them have lessened the pay for artists. Some artists are facing challenges on how to monetize the digital world. For instance, if you live stream for a presenter and the presentation continues to be available beyond the date of the performance, artists should be compensated for that which involves royalty payments to artists."

"...depression and a sense of hopelessness observed by teachers of many of their students (we serve pre-college age). Many of our faculty also shows signs of burnout from trying so hard to engage their students, and from the constantly shifting federal, state and county guidelines."

"I fear the 'return to normal' will have a negative effect on musicians and composers in general. The glut of displaced musicians will be vying for even fewer opportunities at fewer venues. This will undoubtedly result in a climate providing too few opportunities for paying gigs. Many younger players will be willing to work for far lower fees or even for free. In the long run, funding will end up being even more scarce when venues and organizations realize the need to compensate ensembles is less of a necessity."

Using digital technology has brought more audience members into my fold than performing in person ever could. I embrace it!

"The government PUA has been crucial to my economic survival as were the early emergency relief funds I was granted. With the 50% reduction in the PUA 2nd program which is NOT adequate as a sole means of consistent income when the Pandemic conditions do not yet permit a return to anything resembling 'normal' - conditions are stressful and problematic. My booking agency has indicated that I should not expect any significant change in opportunities to work into the Fall of 2021, at the earliest and most likely not until the first or 2nd quarter of 2022!! The psychological and physiological impact is negative, and cannot be overstated in that respect."

"The music industry is hit harder than many others (e.g. the restaurant industry, where people typically don't book 6-8 months in advance). This logistic challenge is creating undue hardship for performing artists."

"The government PUA has been crucial to my economic survival as were the early emergency relief funds I was granted. With the 50% reduction in the PUA 2nd program which is NOT adequate as a sole means of consistent income when the Pandemic conditions do not yet permit a return to anything resembling 'normal' - conditions are stressful and problematic. My booking agency has indicated that I should not expect any significant change in opportunities to work into the Fall of 2021, at the earliest and most likely not until the first or 2nd quarter of 2022!! The psychological and physiological impact is negative, and cannot be overstated in that respect."
"We will run a deficit this fiscal year (ending June 30) for the first time in our 30-year history, due to expenses of hiring first rate audio-video team and lower # of ticket sales. We will probably run a deficit next season as well, due to peoples’ hesitancy to come back to in-person performances. On the other hand, our donors and sponsors have been incredibly generous this past season, so we are well supported by our loyal audience members and they have written lovely notes of gratitude about our virtual season. Of course, we’re hoping for the good will, gratitude and good ticket sales to continue next season!"

"We are attempting to return to live performances this summer for small, socially-distanced audiences. But initial ticket sales are much slower than usual. We are not sure if audiences are ready for this just yet."

"We are concerned we will not be able to lure much of our audience back to live concerts."

"We were able to quickly adapt to the need for virtual programming. Since we are a small company that does everything in house, we just kept trucking along. In a way, the pandemic gave us a leg up on more established companies who weren't able to or willing to adapt as quickly. It helped level the playing field a bit."

"We are gingerly and tentatively stepping into doing hybrid concerts in the fall, pending continuing public health approval and anticipate performing hybrid format (small audience + online) through the season, without dropping either. Doing so will add another layer of cost and complication to every performance."

"While we are ready to return to smaller, live performances, we are at the mercy of the facilities where we rent space. Decisions are being made slowly. While we hope to begin presenting in October, it will depend on what the University of Denver (where we present) decides is feasible."

"We have been able to reschedule all concerts that were canceled from March 2020 through March 2021. Working with the artists and their management, we put into place COVID protocols: greatly reduced audience size by not selling any box office tickets, presenting concerts outdoors until April 2021, requiring masks, taking temps at the door, leaving five doors open in the venue during the concert for cross ventilation, no intermissions and getting rid of the complementary cookie and coffee receptions. Donations have greatly increased from our generous subscribers and past subscribers."

"We livestreamed for the first time; probably inevitable in this day of age. We are not happy about this, and have yet to figure out how we can balance accessibility to sustaining revenue that only brought a portion of the production cost to begin with. We also feel we cannot ask the audiences to pay the full price of pre-COVID just yet. We live in a small town where audiences are increasingly aging; young generations just don't have revenue they can spare, nor are they interested because Internet makes music that much more accessible at practically no cost. So we will try free admission for another year - and then see where we are thereafter."
For informational resources and ongoing relief and recovery opportunities, please visit:
https://www.chamber-music.org/resources/covid-19

This report has been published in partnership with the Wallace Foundation's "Building Audiences for the Arts" initiative.