The Space / Hybrid Survey Analysis: Orchestras Canada

57 Survey Responses

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Summary

Marketing (social media)

fundraising

Hardware

Software

Performance Capture

Infrastructure

Expertise & Learning

Digital Development

Rights

Three key areas of activity:

1. Production/ Performance Capture

2. Connecting with audiences and performers through Social Media

3. Platforms for Participation

- 84% tried new digital initiatives

- 44% will continue to have a digital offer

- 12% will look to increase their digital offer

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Summary: Growth

Marketing (social media)

fundraising

Hardware

Software

Performance Capture

Infrastructure

Expertise & Learning

Digital Development

Rights

- Digital activities have grown, including social media, communication, performance, rehearsals, classes, audience development, additional content/ targeted content, new commissions and governance

- Growth required new skills and expertise, which were delivered either by bringing in contractors, or by skilling up existing staff (through mentoring, online tutorials or hands on learning)

- Organizations are open to and interested in learning and have accessed online platforms

- Achieving high quality performance capture has highlighted the need for additional equipment and infrastructure to support growth. For many organizations this will require considerable investment.

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Summary: Needs have accompanied Growth

Marketing (social media)

fundraising

Hardware

Software

Performance Capture

Infrastructure

Expertise & Learning

Digital Development

Rights

Orchestras cited the need for

- better tools, equipment (hardware) to buy or to rent, infrastructure (e.g. lighting), and services such as higher-speed internet, streaming services)

- access to the right technology that is fit for purpose;

- access to technical expertise: editing and video production, marketing support (including the need to build digital expertise on staff).

- access to experts to build in-house knowledge and practical skills

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Summary: The Future

Marketing (social media)

fundraising

Hardware

Software

Performance Capture

Infrastructure

Expertise & Learning

Digital Development

Rights

Future plans include:

Live streaming, accessing new platforms, performance capture, digitizing work, increasing connections, audience development opportunities, experimenting & learning, opening out digital performing spaces, expanding digital engagement (including talks & online activity)

Identified knowledge gaps include

- Managing rights clearances and labour agreements

- Monetization strategies

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Feedback on applying to Canada Council's Arts Digital Strategy Fund

16 respondents (33%) had applied for a grant from the Canada Council Digital Strategy Fund

5 applicants were successful

**Many responding orchestras didn't apply to the fund. Why?**

- They weren't eligible, for any number of reasons
- They found programs confusing and complicated
- Partnerships were an early requirement for applications to the program *(though this was adjusted later)*, and this dissuaded some groups from proceeding as they didn't have existing, organic collaborations in place.
- Orchestras wanted funding for specific projects, not investigation or inquiry

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Future funding focus

- Orchestras are looking for funding to support risk, and to underwrite training and upskilling

- All applicants undertaking Digital Strategy Fund projects were willing to share what they had learned with the sector, so there is scope to facilitate greater sharing of insights

- Orchestras estimated a wide range of financial needs for digital improvements, but amounts were modest overall:

    Average Request $63,368

    Median Request $35,733

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FINDINGS

Q1: Did you try one or more new digital initiatives since March 2020? If yes, please list your new digital initiative or initiatives.
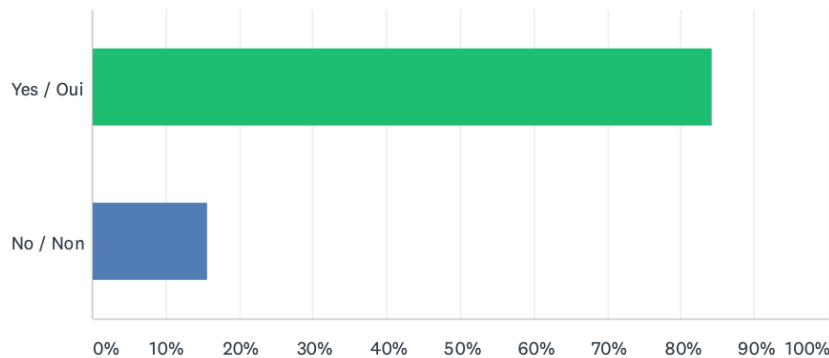
ANSWER CHOICES	RESPONSES	
Yes / Oui	84.21%	48
No / Non	15.79%	9
TOTAL		57

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- 84% of survey respondents had tried one or more new digital initiatives since March 2020.
- The majority of new digital initiatives were housed on social media – YouTube, Facebook Live, and Instagram
  - Activities offered included performance capture/ live events, informal content such as behind the scenes, quizzes and watch parties
- Recordings and performances featured strongly, as did podcasts and archive material.
  - In addition, organizations hosted musicians performing short pieces from their homes.

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- Organizations had taken the opportunity to **develop audience specific** work online
  - This included videos for children, programmes for young people and families, digital outreach material such as home learning packages on 'music and culture' and read aloud/along series, and online education programmes

- **Interactive sessions**
  - Included education outreach, online Q&A sessions (factual and creative), online music lessons, an orchestra classroom, masterclasses, rehearsals, audition training and private lessons, daily warmups, digital symposia

- **Practical tools for delivery**
  - Many used or adapted tools like Zoom for meetings, lessons and rehearsals

- **Broader developments**
  - Awareness raising to reach new audiences
  - Digital engagement strategies

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- **Keeping connections alive**
  - With players, board members, patrons, supporters
- **Developing a digital strategy**
  - Developing digital technical expertise
- **Providing Opportunities for Players**
  - Providing performance opportunities
  - Keeping players connected with audiences and one another
- **Providing children's resources**
  - Interactive, educational, entertaining
- **Increasing brand visibility**
  - Through a diversified and increased online presence; developing service provision
- **Providing behind the scenes content**
- **Contributing towards fundraising**

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- ## **Challenges:**

- **Content creation**
  - Feeling disconnected from musicians
  - Keeping musicians equitably engaged
  - Difficulties of playing together online versus in real life

- **Rights** and copyright clearances
  - Remaining compatible with Union agreements

- Having the **resources** to provide quality digital content

- Digital **marketing**
- Bringing tech challenged audiences along
- Dissemination

- Having sufficient **digital expertise** – including filming, sound recording and editing

- Digital technical **infrastructure**

- Lost **revenue**

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- **Opportunities:**

  - Growing audiences, patrons
  - Community engagement

  - Developing musical skill
  - Developing new work

  - Staff development
  - Time to … dedicate to the creation of new projects
  - Time to plan strategically

  - Trying out new platforms
  - Digital development

  - Virtual fundraising targets

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Q5: What do you wish you had known before starting?

- **Practical** information such as Zoom requirements and capabilities
- **Resources**: **time required** to develop digital content and marketing, access to **expertise** (whether in-house or external)
- **Development**: how to **accommodate digital** material; being comfortable with **unpredictability** and short planning cycles; the **amount** of development work required
- **Technical** knowledge: including **licensing** fees; **expertise** and knowledge required to shoot and record online performance (cameras use, lighting); using video editing platforms; costs; synchronization **rights**

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Q6: What help did you need throughout the process?

Q6: What help did you need throughout the process?

- **Staying connected** with patrons, donors, sponsors, volunteers
- Access to appropriate **equipment**
- Knowing what the **best platforms** were
- **Volunteer** support
- Technical support
    - Understanding **editing**
    - How to produce high quality **audio**
    - How to produce **podcasts**
    - **Operating** camera/ sound equipment
- Learning how to **engage and promote** work/ activities **online**
- **Union** negotiations
- **Rights** for non-public domain works
- **Peer** support

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Q7: Anything else you'd like to share?

- Navigating social media
- Developing a Digital Plan
- Audience Development
- Web Marketing
- Webinars
- Tech Support
- Persuading Board to move from live to digital

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Q8: What digital initiatives do you have planned for this season (20-21)?

- **Social Media** - Increasing social media presence
- **Communication** - Distributing a monthly newsletter
- **Performance/ Rehearsals/ Classes** – Warm Ups / Online concerts / Online rehearsals / Orchestra performance videos / high quality audio and video / online Pop Up Orchestra Festival
- **Innovating -** Working remotely to create programmes that involve a combination of streaming and live interactive digital communication
- **Extending Audiences -** Online performances for Artists in Healthcare and for prison inmates
- **Additional Content -** Hosting online interviews with musicians / Moving existing audience engagement activities (e.g. pre-concert talks) online / Podcasts / Online Q&A's with conductors
- **Targeted Content -** Video series for children – curriculum and online learning activities / Digital symposium in early 2021 to share best practice with other arts organizations
- **New Commissions -** Commissioned composers to write new work – in isolated orchestra videos / Commission with a digital element / New recorded musical content
- **Governance -** Digital delivery of monthly Board meetings and postponed AGM

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Q9: What digital initiatives do you have planned for future seasons?

- **Performance capture** is a key element
- **Live streaming** and identifying **new platforms** (including paid) were key elements planned for future seasons.
  - performances, family and educational programming and new, non-traditional content
- The potential for **meaningful connections** in relation to education, outreach and broadening programme content (e.g. 'digital galas', online auctions, documentaries)
- **Audience development** opportunities, delivering content to those who may not want, or be able, to physically attend (e.g. those who live far away or are unable to travel to concert venues)
- Augmented reality
- A few were not yet sure how future seasons would look but did want to continue some digital elements

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- The majority were interested in **equipment**: Microphones, Video/ HD cameras, USB audio interface, RAID server, Hard disc capacity, Digital editing suite, Tessitura upgrades, Final Cut Pro, Prosumer video camera, Tripod, BlackMagic pocket cinema cameras, Sony SRG-X400, Royer mics, Black Magic ATEM Switcher TV
  - There were mixed views on whether to buy or rent
- **Infrastructural:** Stage and lighting improvements for better performance capture
- **Services:** Upgrading Wi-Fi, social media tools such as Full Story and Sprout, Spektrix and UK partner 'Cog', JW Player as a streaming service
- **Roles:** Videographers and video editors, Digital /software expert, Marketing and Promotion Director, Technical consultant
- **Other:** Integrate ticketing/donations software with the video platform
- Create 'watch parties' with commentary and easy integration into website
- **Knowledge:** experts with own equipment; focus on performance capture including sound and video skills

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Q11: What training and support will your organization need to do these initiatives better?

- **Technical** expertise was particularly sought, areas included technical knowledge of streaming; the creation, production and filming of virtual concerts; editing video and audio; digital production; sound engineering and identifying ways to distribute 'individualized tickets'
- **Skills** sought after were digital, editing, video production, sound editing and graphic design
- Online **Marketing Support** included digital marketing, social media/ communications training, an understanding and knowledge of the different platforms and how best to work with them as well as measuring analytics
    - Respondents wanted to have a better understanding of **where to invest** and the **costs versus return on investment** – particularly given the wide range of **marketing** options available
- There was significant interest and take up of **training**, through for e.g. seminars, Google university courses, using YouTube videos to learn.
    - Easy tutorials on the basics of how to use resources would be welcomed
- Respondents recognised how important it was to **stay ahead** of best audio/ video and software technologies
- Better understanding of how digital could sit within existing **staffing roles** was sought

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Q12A: What else will you need? Money: if yes, how much?

- **Total Request** $2,281,233.00

- **Average Request** $63,367.58

- **Median Request** $35,733.00

- **Funds requested for:**

- - Staff

- - Staff Training

- - Consulting technical contract

- - Technical assistance/ Hire of Technicians

- - Venues

- - Hardware

- - Tech Upgrades

- - Film production

- - Digital Recital Series

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Q12B – New Skills

- New **technical skills** were the priority for respondents. These included:
  - video production, recording, directing, editing, virtual recording, audio/ music editing.
- The second largest skillset identified was **Marketing**, including
  - Virtual/ Digital Marketing, improving SEO, better use of email and social media to promote engagement and events, data manipulation, how to create click tracks, website management
- Developing **streaming skills** - as well as knowledge of other technology products that can be used concurrently
- **Hardware** skills, namely, **general IT** skills to set up new computer systems
- Knowing about **best practices in the digital space**
- A few respondents cautioned that they needed more training for a range of staff than specific new skills; with managing remote staff the most crucial need
- It is unsurprising that the additional staff required were closely related to the skills sought/ needed

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- Respondents confirmed that – if they were to add staff – they were looking for strong technical skills (hardware and software), including general IT support.

- Those with marketing and social media skills/ experience were highly sought.

- Non-digital staffing roles to fill included jobs in fundraising, admin support. And artists (teachers and conductors) able to work in an on-line environment

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Q13: Anything else you'd like to share?

- High levels of online competition meant that smaller organizations felt that they were competing with larger, better resourced groups

- Costs of digital prohibit community orchestra engagement
- Costs of livestreaming (including performance capture) limits its adoption

- There are opportunities
  - For musicians to connect
  - To find new ways to engage audiences
  - To create new connections by building online communities
  - To increase reach
  - For broader promotion of cultural opportunities

- Need for training, access to relevant skills and/ or technical support
- Additional staff would be required to deliver digital content

- Patrons aren't 'tech savvy' so even if digital programming exists, some patrons are unlikely to access

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Q14: Once full-capacity audiences are able to return to the concert hall, are you planning to sustain a level of digital activity?
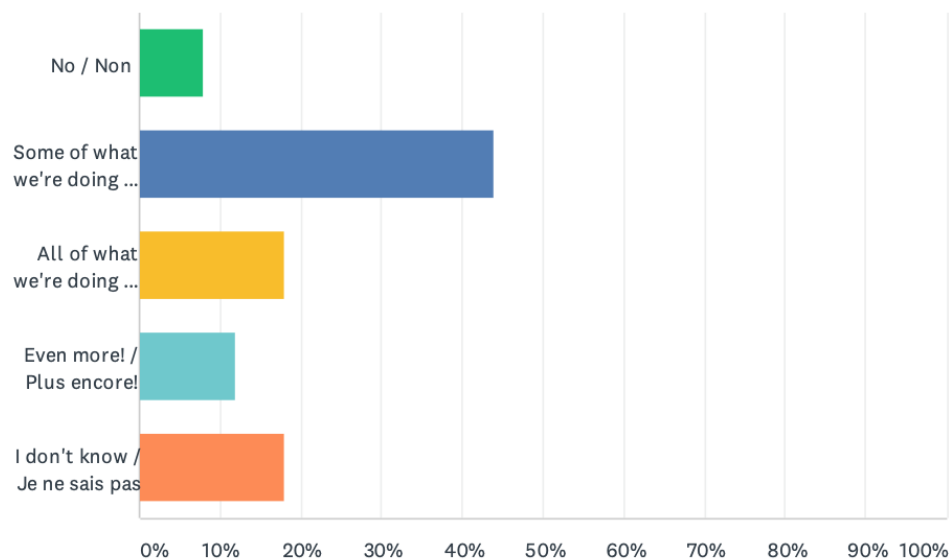
ANSWER CHOICES	RESPONSES	
No / Non	8.00%	4
Some of what we're doing / Certaines de celles que nous avons	44.00%	22
All of what we're doing / Toutes celles que nous avons	18.00%	9
Even more! / Plus encore!	12.00%	6
I don't know / Je ne sais pas	18.00%	9
TOTAL		50

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- **Who featured heavily**
  Berliner Philharmoniker

- **+1 mention**
  Tafelmusik, L'Orchestre Metropolitan Montreal, Vancouver SO

- **Mentions**
  LA Phil, Canzona Chamber Player, London Philharmonic, Chicago Symphony (CSOtv), Luminate Scotland, Rotterdam Philharmonic (Music in Motion), Toronto Symphony Orchestra, L'Orchestre symphonique de Laval, l'Orchestre de Toronto , Ulster Orchestra, Houston, Bang-on the Can (New York) , Vienna Philharmonic, Kingston Symphony, Wigmore Hall

Q16: Are there non-orchestral organizations (arts and non-arts) whose COVID-era digital efforts you've really admired? Please name them and describe their efforts.

- CircusFest (September 2020),
- National Ballet
- Le festival des Arts de St-Sauveur
- Rien de précis
- Eric Whitacre's choral projects
- Quartetto Gelato
- Isabel Digital Concert Hall (Cello competition)
- Mariposa Folk Festival (Digital stage presentations)
- New York Times (At Home series)
- Metropolitan Opera
- National Theatre (Archived performances with interviews
- Les vidéos de Music

- Beyond festival in Ottawa Festival
- Montréal Baroque
- Théâtre Cercle Molière, Winnipeg
- Odin quartet
- Tuckamore Festival (August 2020)
- The NBA

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Q17: Has your orchestra applied for a grant through the Canada Council for the Arts Digital Strategy Fund?
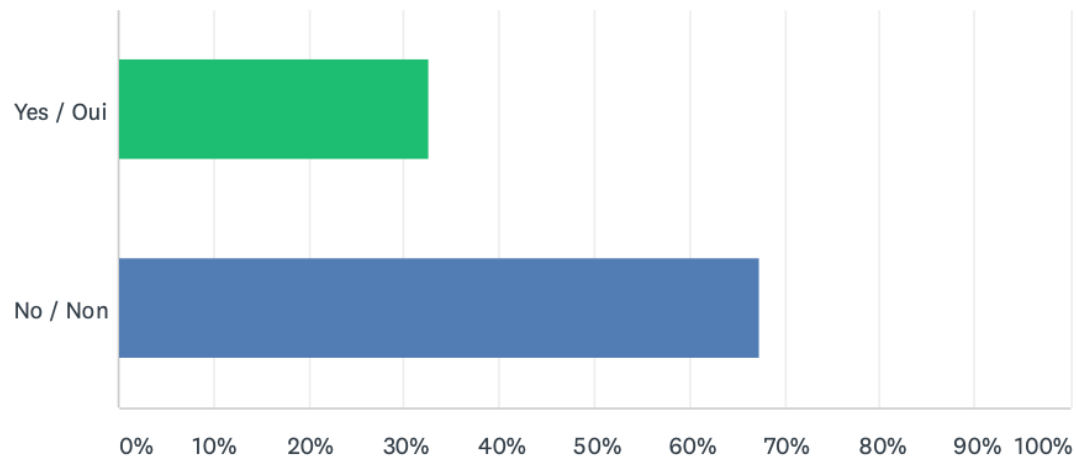
ANSWER CHOICES	RESPONSES	
Yes / Oui	32.65%	16
No / Non	67.35%	33
TOTAL		49

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Q18: if you didn't apply, why not?
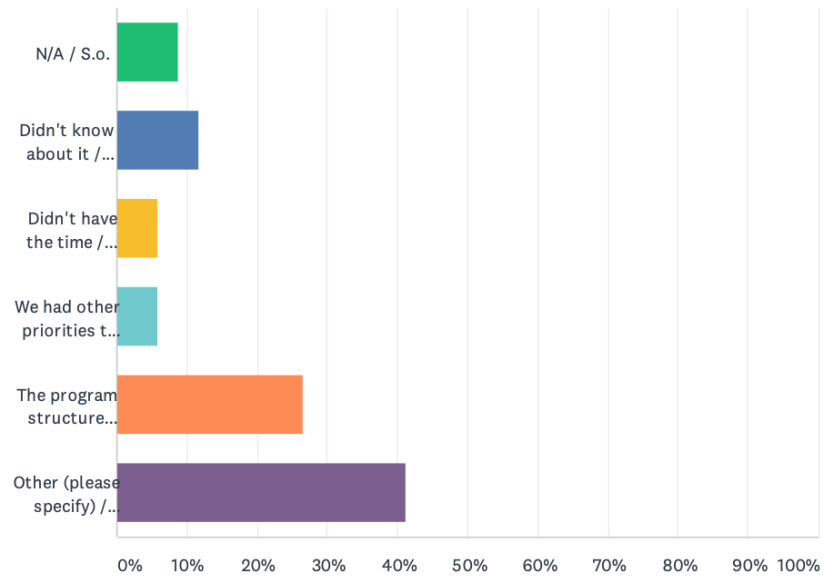
ANSWER CHOICES	RESPONSES	
N/A / S.o.	8.82%	3
Didn't know about it / N'était pas au courant	11.76%	4
Didn't have the time / N'avait pas le temps	5.88%	2
We had other priorities than digital / Avait d'autres priorités que le numérique	5.88%	2
The program structure didn't align with our activities or interests / La structure du programme ne correspondait pas à nos activités ou intérêts	26.47%	9
Other (please specify) / Autre raison (veuillez préciser)	41.18%	14
TOTAL		34

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Q18: Other (please specify)

- A number of organizations were **not eligible**, either because they were part of a Crown Corporation, because they were semi-professional or another, non stated, reason.
- Respondents highlighted the **complexity and confusing nature of the application process, n**oting confusing categories and criteria that were unclear, even after taking advice.
- The need for **partnerships** caused some respondents delays, this was considered complicated to generate in a relatively short period of time.
- organizations queried **what qualified for funding**, that the programme only offered support for investigating digital options, one organization was past this stage and wanted to 'ramp up' quickly.
- An issue raised by respondents was the fact that the fund **didn't support the production or formatting of video recordings,** it didn't support teachers delivering the music curriculum. It also didn't support researching and creating artistic works. Work also needed to be part of a larger digital strategic initiative.
- organizations highlighted that the **amount of administration required** meant that an application had dropped to a lower priority.
- One organization didn't have **an appropriate project**, and were, instead, focused on producing work online.
- The feeling that they **wouldn't be successful** had put off one company, feeling that they also didn't have the time or resources to interpret funders priorities.
- One organization was **still developing their application,** another hadn't seen the funding as necessary, since they were **accessing Covid support funding**.

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Q19: If yes, to which component did you apply

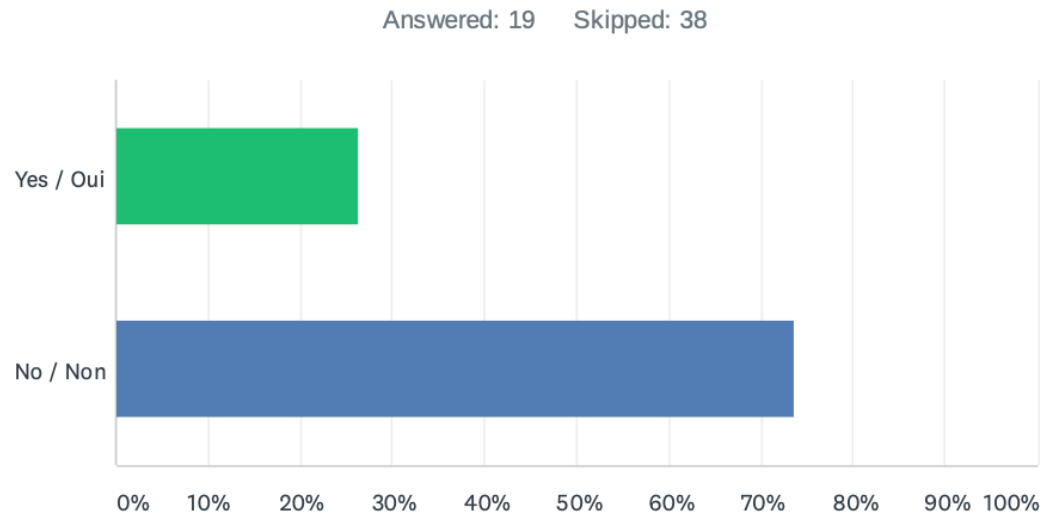| ANSWER CHOICES	RESPONSES	
We didn't apply / N'a pas fait de demande	55.56%	20
Special initiative for core funded organizations / Initiative spéciale pour les organismes recevant un financement de base	11.11%	4
Digital Literacy and Intelligence / Littératie et intelligence numérique	11.11%	4
Public Access to the Arts and Citizen Engagement / Accessibilité aux arts et engagement culturel des citoyens	16.67%	6
Transformation of Organizational Models / Transformation des modèles organisationnels	11.11%	4
Digital Originals / Originaux numériques	8.33%	3
Total Respondents: 36		
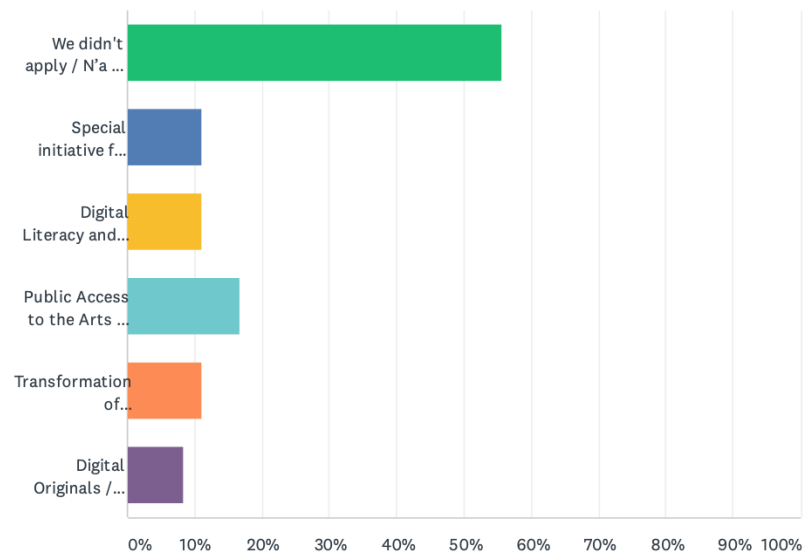
Q20: If yes, what was your project?

- **Many respondents were interested in opening out digital performance spaces**
  - Developing a video series, podcasts
  - Recording the full orchestra in a concert performance

  - Reaching out to remote parts of the province and beyond through new technologies

  - Recording symphony to share these with patrons, schools, retirement homes
  - Providing concert livestreams to long-term care residents across Canada
  - Providing concert livestreams to students of community music programs

  - Providing pre-concert and post-concert digital seminars with music educators and our musicians
- **And Expanded Digital Engagement through talks and online activity**
  - Our digital symposium
  - Nous offrirons des concerts, causeries et activités en ligne tout au long de l'automne, selon un calendrier de diffusion précis.

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- **Experimented and learned:**
  - To a greater
    - Tout l'été, nous avons été invités à explorer les propriétés de ce dispositif technologique, en collaboration avec une equipe de specialistes du son, de l'image et des plateformes web. En nous permettant de mesurer les principes de captation, d'edition et de diffusion rendus possibles grâce au dispositif, ce laboratoire estival nous a amenés à preciser notre pensee numerique
    - Hired consultants to do Digital Maturity Assessment, Digital Needs Assessment and Digital Strategy
  - Or lesser degree
    - Training one staff member
- **Developed digital platforms**
  - Creation of a digital platform
  - Access for students (particularly those in remote locations/ private lessons)
- **Overhauled Digital Strategy**
  - Overhaul of digital strategy (hired local consultant to oversee all aspects & provide recommendations)
- **Purchased Hardware**
  - Purchasing equipment

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Q21: Was your application/were your applications successful? /

Answered: 19   Skipped: 38

ANSWER CHOICES	RESPONSES	
Yes / Oui	26.32%	5
No / Non	73.68%	14
TOTAL		19

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Q22: If the answer was no to Q.21, did you get feedback if you were not successful?
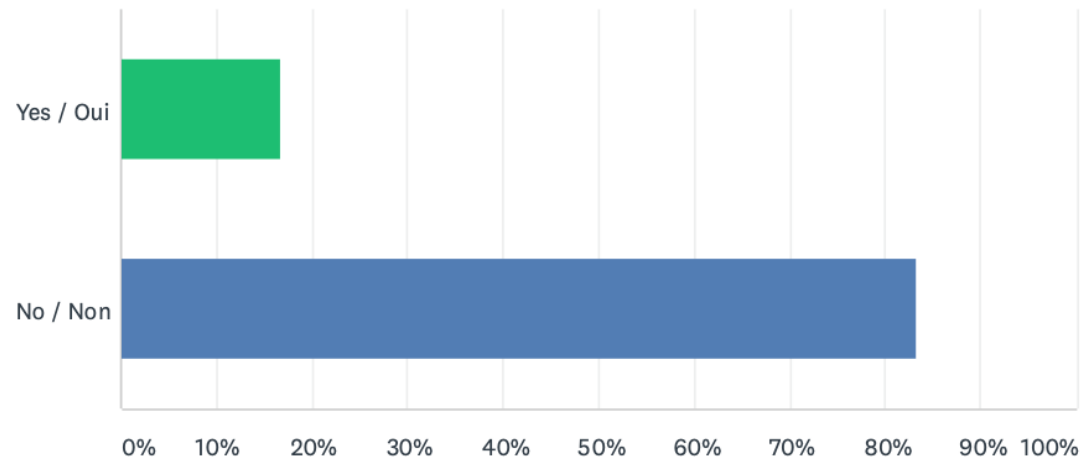
ANSWER CHOICES	RESPONSES	
Yes / Oui	16.67%	2
No / Non	83.33%	10
TOTAL		12

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Q23: If the answer was yes to Q.21, how far along is your project?
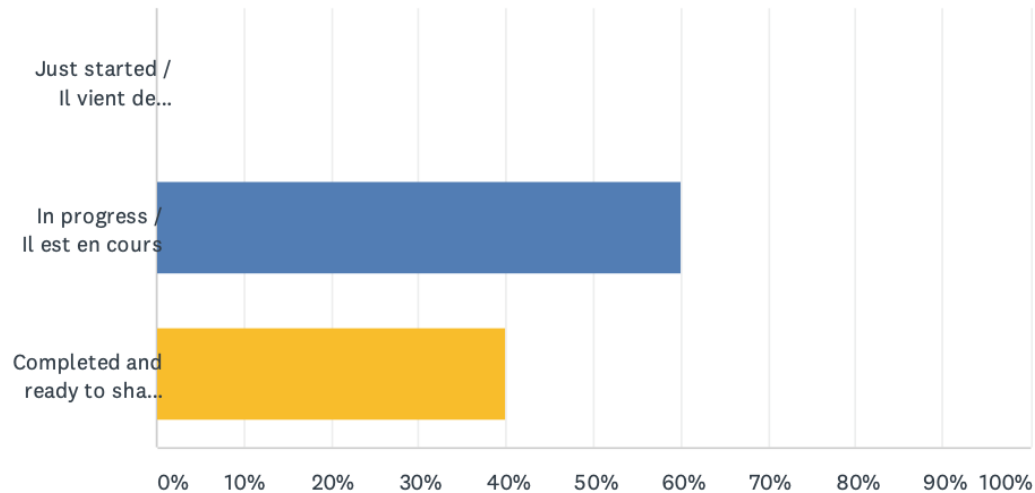
ANSWER CHOICES	RESPONSES	
Just started / Il vient de commencer	0.00%	0
In progress / Il est en cours	60.00%	3
Completed and ready to share / Il est achevé et prêt à être partagé	40.00%	2
TOTAL		5

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Q24: Would you be willing to share your learnings from your DSF project with colleagues?
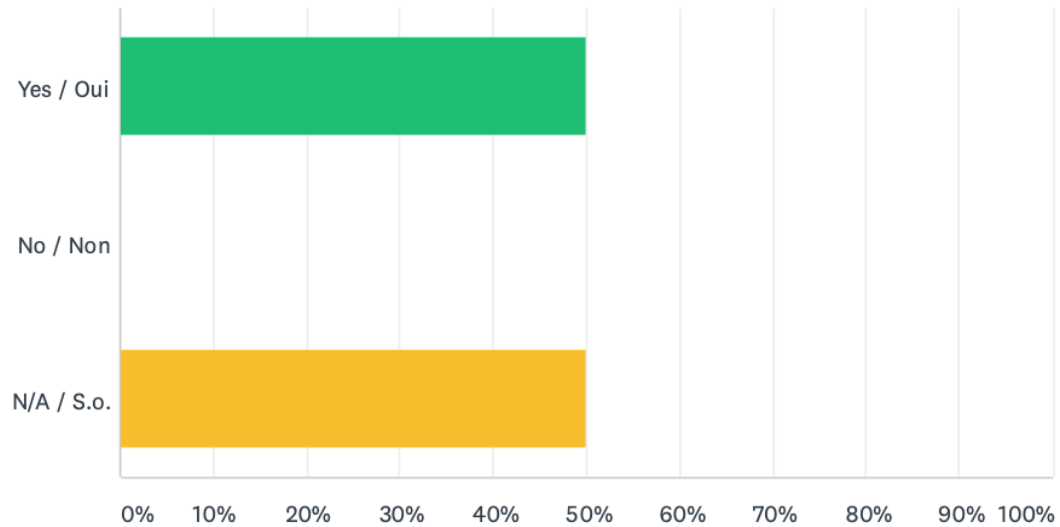
ANSWER CHOICES	RESPONSES	
Yes / Oui	50.00%	11
No / Non	0.00%	0
N/A / S.o.	50.00%	11
TOTAL		22

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