

THE AUDIENCE FOR AMERICA'S MUSIC

A SUMMARY REPORT OF THE LINEAR GROUP BLUEGRASS SURVEY '84

by

Arthur Menius

28 September 1984

SUMMARY OF RESULTS

The Linear Group Bluegrass Survey '84 elicited valid responses from 2106 people at the four festivals. These respondents represented every state except Hawaii, plus Canada and Japan. They came from almost every strata of white American society.

While broadly representative, the data tend to run counter to the hillbilly/redneck and hippie/biker stereotypes which have plagued American acoustic music. In fact, the results indicate a very promising market for entertainment products directed at the 25-44 year olds.

Among those surveyed, 55.7% fell within the 25-44 bracket, almost twice the 28.6% for the American populus. While 37.4% of the general population falls in the 25 to 54 slot, that category includes 69.3% of the bluegrass fans.

These bluegrass fans are not ignorant mountain folk, but rather better educated than the average American. More than twice as many of our sample (35.6%) have completed college than the general population (17.1%). The bluegrass fan is almost as likely to have attended graduate or professional school (16.7%) as the average American is to have finished his undergraduate curriculum. Almost nine out of every ten (88.6%) of the bluegrassers hold high school diplomas, but only seven tenths of the Americans do (69.8%).

We are all told that more school means more pay, and while we have learned that it ain't necessarily so, 55.7% of the respondents earn over \$20,000 per year as compared to 47.9% of the people at large. White collar workers comprise 41.4 % of the bluegrass audience as opposed to 30.6% blue collar. In the 1973 bluegrass

survey, the white collars outnumbered the blues by only 38% to 36%. Some 55.8% of the bluegrass fans have overcome high interest rates to own their own home. That figure is more impressive when one notes that but 47% of the bluegrassers are married, almost 18% below the national average.

The survey responses still indicated a predominantly male audience. Men returned 61% of our forms although they comprise only 47.8% of the American people. The 1973 bluegrass survey, however, received a whopping 81% of its return from men.

American acoustic music is rural, but its fans by and large are not. Just over 30% of our nation's people are rural residents, but only 25.3% of the bluegrassers live in the country. In 1973 only 24% of the music's fans lived in cities over 50,000 population. Today the figure is 30.8%. Bluegrass is becoming less male and more urban and white collar.

These people are ardent bluegrass consumers. They attend an average of 3.3 three day and longer bluegrass festivals each summer. That figure has increased from 2.9 in 1973. 45.4 of the festival goers make the events the central part of their vacations, and 46.6% camp at the music parks. Three quarters (73.6%) of them drive over 100 miles to go to festivals, and one in eight (11.9%) travel over 500 miles to hear America's music. Over a third (34.5%) reported that they hear live bluegrass more than ten times a year, and one in every fifteen endeavors to hear live bluegrass more than once a week. Those who buy at least one bluegrass record per year form 74.2% of the audience, and 4.6% buy over 20 bluegrass albums per annum. All that although only 54.5% of the respondents have access to a store which stocks bluegrass records. That makes in person sales a vital component of the industry.

Bluegrass is not all that these folks consume. They drink sodas (77.7%), beer (60.9%), wine (47.4%), and liquor (42.8%). Vehicles fall high on their list of priorities; 82% own cars, 15.5% recreational vehicles, and a whopping 38.3% possess trucks. 10.5% still need to own a tractor. Users of tobacco products are 35.5% of the bluegrass audience. 89.2% wear jeans, and 81% are proud to consider themselves do it yourselfers. Bluegrass is unquestionably a do it yourself sort of music.

Although friends turned on the most (38.4%) of the respondents to bluegrass, radio comes in a strong second at 31.3%. More importantly, an incredible 80.5% said that the American sound of bluegrass immediately attracted their attention. All it takes is hearing a good bluegrass band live. Almost half the universe (48.6%) have known bluegrass less than ten years, and those people are spread quite evenly across the country. One in five fans (18.6%) have followed bluegrass for over a quarter century. These people are concentrated in the South and midwest.

Media consumption figures indicate the opportunity before us. While 90.6% of the bluegrass fans currently listen to the radio, a slightly larger amount (90.9%) would listen to a bluegrass radio show. Only half (50.24%), moreover, of this wonderful market are currently served by a bluegrass radio show. None of these programs, moreover, offer anything in the way of live acoustic music which can compete with the "Liberty Flyer."

The run for "Fire on the Mountain" viewers confirms that bluegrass programming brings in its own new audience. Almost a third (28.9%) of those who watch the show characterize themselves as viewing "very little" television. 55.8% are 25 to 44 years

old. Their income and educational levels are even higher than the average bluegrass fan. An incredible 95.6% of the bluegrass fans familiar with "Fire on the Mountain" indicated that they would listen to a Linear Group produced radio show.

Analysis of the twelve most popular American acoustic bands, by contrast, tended to conform both to regional variations within the audience and to stereotypes held by industry observers. The twelve top draws can be divided pretty neatly into three classes. The older, traditional artists (Bill Monroe, Jim and Jesse, Ralph Stanley, and the Osborne Brothers) all drew more than half their support from midwestern fans. Their fans generally ran over 40% rural, and were more likely to be blue collar and over 45 years old than the average festival goer. These bands draw a third to two fifths of their support from the one fifth of the bluegrass audience which has been listening more than 25 years.

The contemporary bluegrass bands (Doyle Lawson, the Seldon Scene, the Country Gentlemen, the Johnson Mountain Boys, and J.D. Crowe) dominate the South, and to a lesser extent, the east coast. They run very strongly in the 25 to 54 year old markets, and except for Lawson and the Johnson Mountain Boys, have fans who are quite likely to be earning over \$30,000 per year.

The new grass outfits (New Grass Revival, Hot Rize, and David Grisman) have carried bluegrass to the western United States from whence they draw more than two thirds of their support. These bands are the ones appealing most heavily to new listeners, and their white collar audience falls mostly in the 18 to 34 brackets. They are more likely to appeal to female listeners.

The basic point of all this is that the bluegrass listener

is likely to be better educated, more affluent, and less rural than the average American. The festival goers are more white collar and urban than a decade ago, and many more women have joined the audience. New developments in the music are recruiting new fans. These people are waiting to hear bluegrass in the commercial media.

ADDENDA TO LINEAR GROUP SURVEY RESULTS

Sample: 2106

Procedure: self administered forms distributed to fans at four festivals chosen for geographic, musical, and social variety: Bean Blossom, IN (483 responses, 22.9%); Telluride, CO (741, 35.2%); Denton, NC (450, 21.4%); and Shinhopple, NY (399, 18.9%).

Respondents represented every state save Hawaii, plus Canada (11) and Japan (6).

Males= 1285 (61%), Females= 800 (38%).

AGE: 0-17 years	72 responses (3.4%)
18-24	271 (12.9%)
25-34	763 (36.2%)
35-44	410 (19.5%)
45-54	287 (13.7%)
55-64	114 (5.4%)
65+	27 (1.3%)

Remaining data of interest has been copied and included herein.