

Blue Ridge Music Trails Partner Research

February 2020



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Introduction

The Blue Ridge National Heritage Area (BRNHA) asked Magellan Strategy Group of Asheville to conduct research among stakeholders associated with the Blue Ridge Music Trails (BRMT), an initiative launched in 2013 by BRNHA and the North Carolina Arts Council to promote the preservation and awareness of traditional music and dance in the western third of North Carolina.

The objective of the research was to assess the following:

- Reported growth in attendance in the past year and since the launch of the BRMT
- Reported growth in economic value of attendees at the site (guest spending)
- Qualitative indicators of success and growth, including any anecdotal indicators
- Types of marketing performed by traditional music events and venues
- Perceived impact of BRMT upon organizations and communities

One hundred fifty-three emailed survey invitations were delivered to BRMT partners in February 2020 by BRNHA staff. A total of 76 completed responses were received by the end of the month (prior to the coronavirus lockdown that impacted much of the United States beginning in March 2020), representing a solid cross-section of ticketed and non-ticketed events and venues across the entire BRMT geography. These respondents included jam sessions, music and dance venues and events of all sizes, regular concert series, and a variety of other BRMT partners such as local arts-related organizations. Respondents represented all but four counties within the 29-county BRMT footprint.

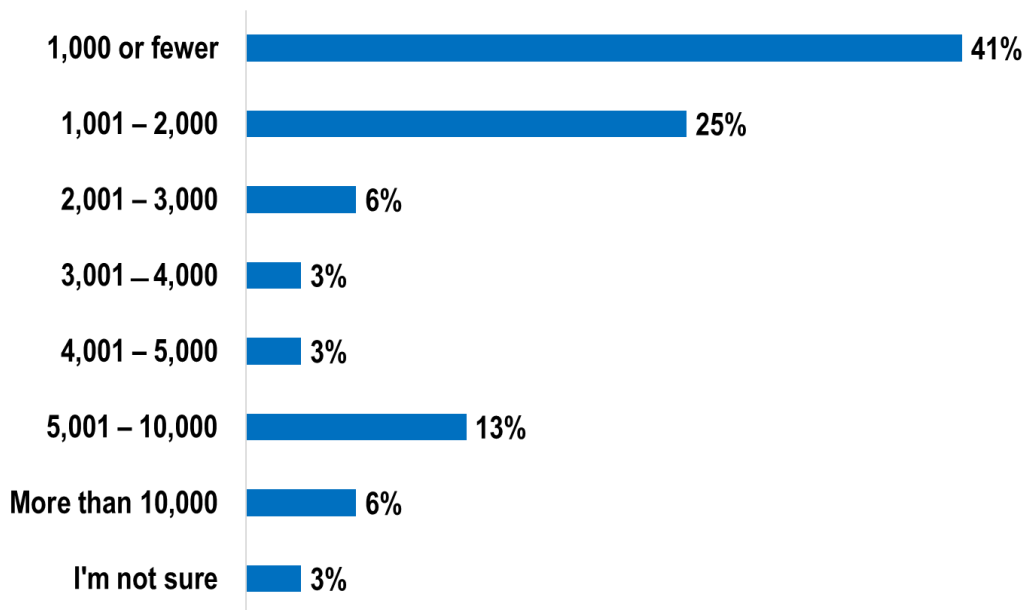


Presentation of Survey Results

BRMT partner respondents were surveyed about a variety of topics related to traditional music in the western third of North Carolina, including the current state of business at their own event or venue, their level of engagement with BRMT, how they promote themselves, and how BRMT may have impacted their organization and community since its launch in 2013. The key findings from the survey are reported here.

Among ticketed venues and events on the BRMT, two-thirds reported attendance of fewer than 2,000 guests in calendar year 2019. A fifth, however, reported 5,000 or more guests at their venue or event, demonstrating the diversity of BRMT partners, events, and venues.

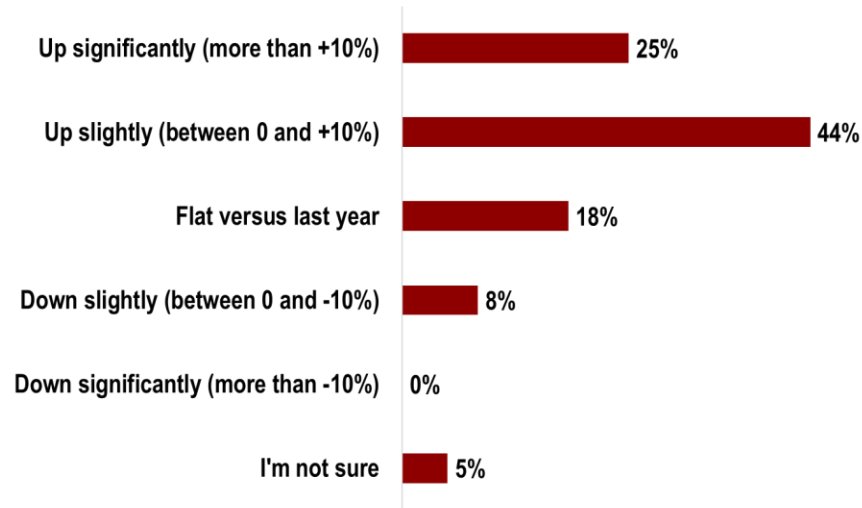
How many total guests or participants did you attract to your ticketed venue or event in 2019?



Among those respondents who were able to track and report attendance for the year, most events and venues reported relatively strong numbers for 2019 versus the prior year 2018. One-quarter of all respondents said their attendance increased by double digits in 2019, and only 8% said their attendance had decreased by any amount.

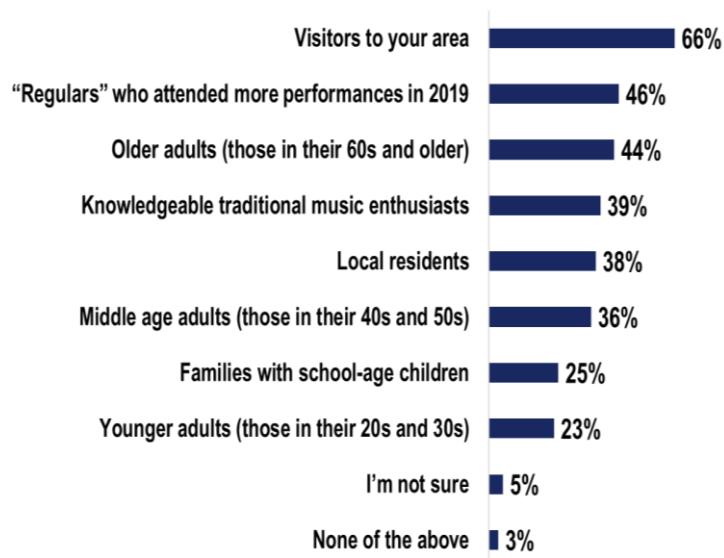


How would you evaluate your attendance in 2019 compared to 2018?



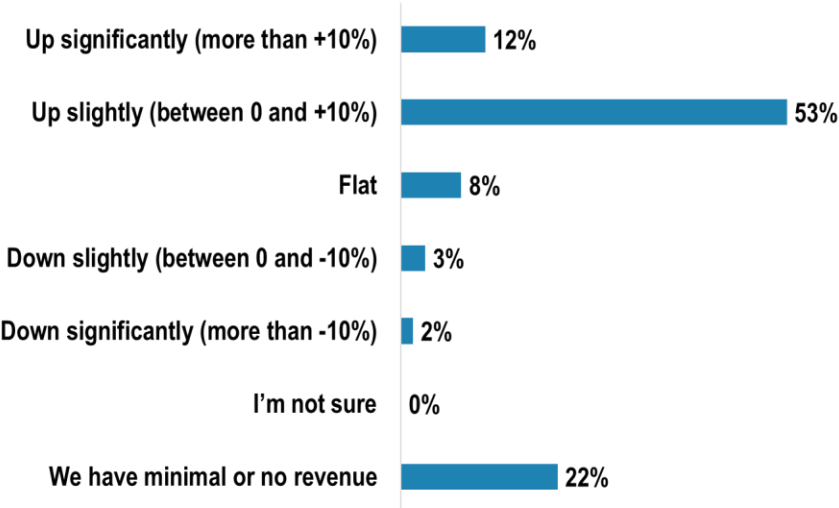
Among those venues and events reporting a rise in attendance in 2019, two-thirds cited more visitors to the area in their audiences as a key driver of the increase. But respondents said other audience segments showed up in bigger numbers as well, including regular attendees, older audiences, and traditional music enthusiasts.

Did you see any increase in attendance at your event or venue from the following kinds of audiences in 2019?



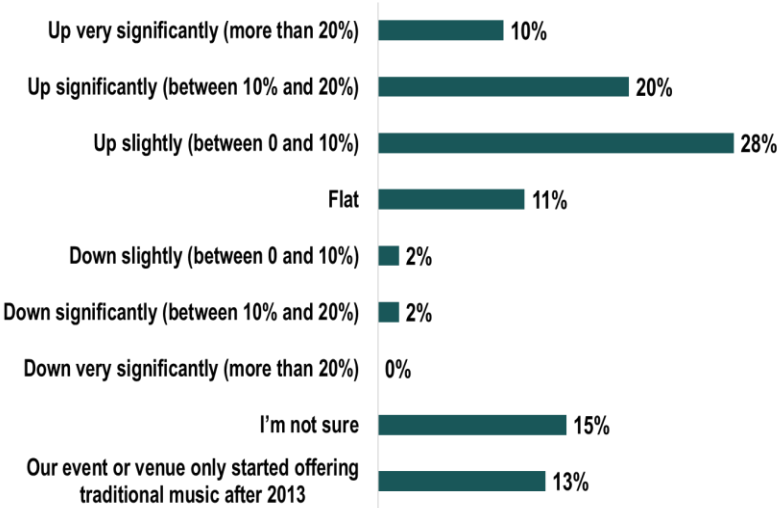
Two-thirds of every respondent that tracks revenue associated with their venue or event reported increased revenue figures for 2019 versus 2018. Only 5% of respondents generating revenue reported any decline. (Only about one in five respondents said they generate minimal or no revenue each year.)

How would you evaluate your revenues in 2019 compared to the prior year (2018)?



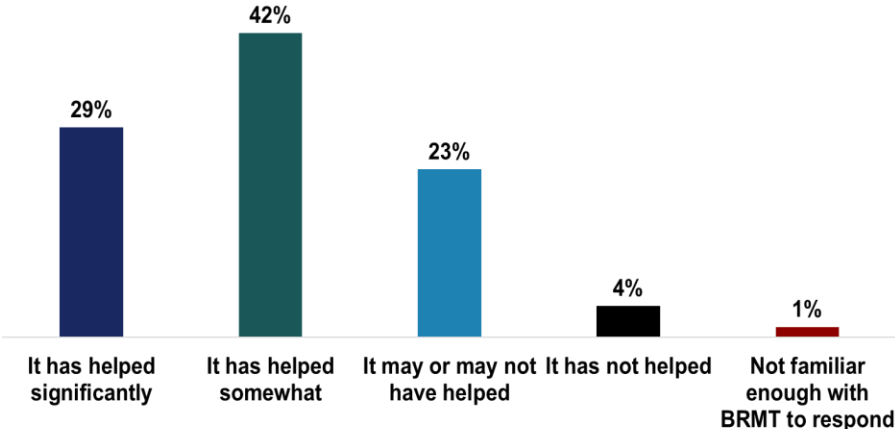
While attendance increases at venues and events may not be directly attributable to the BRMT, very few respondents said their attendance had, in fact, declined since the BRMT launch, and most respondents said it had increased at least slightly during that time.

How would you evaluate attendance at your event of venue since the launch of the Blue Ridge Music Trails of NC in 2013?

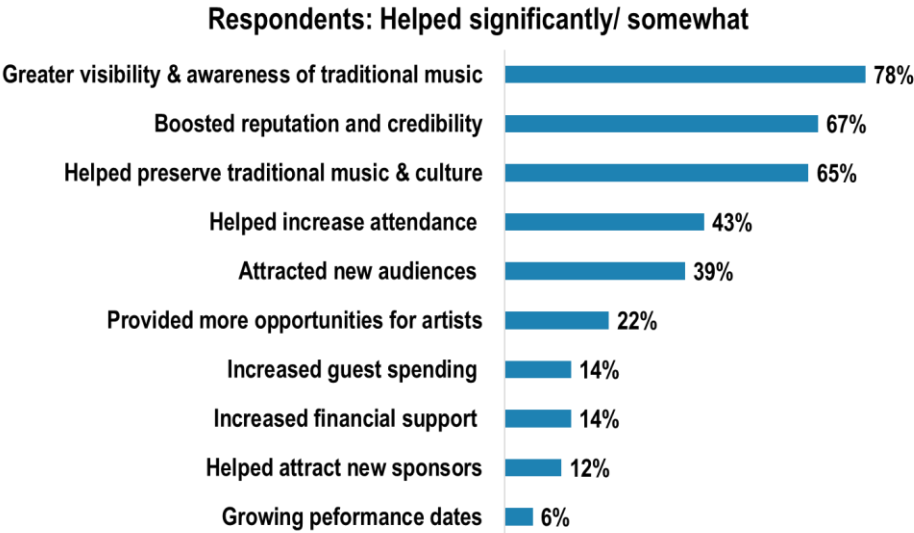


When asked, though, about the impact of the BRMT specifically upon their own organization, most respondents (71%) said they believe the BRMT has helped them at least somewhat, and almost a third said the initiative had helped them significantly. It's also notable that virtually all respondents felt they were sufficiently familiar with the BRMT to respond to this question.

How much do you believe the BRMT program has helped your traditional music event, venue, or organization?

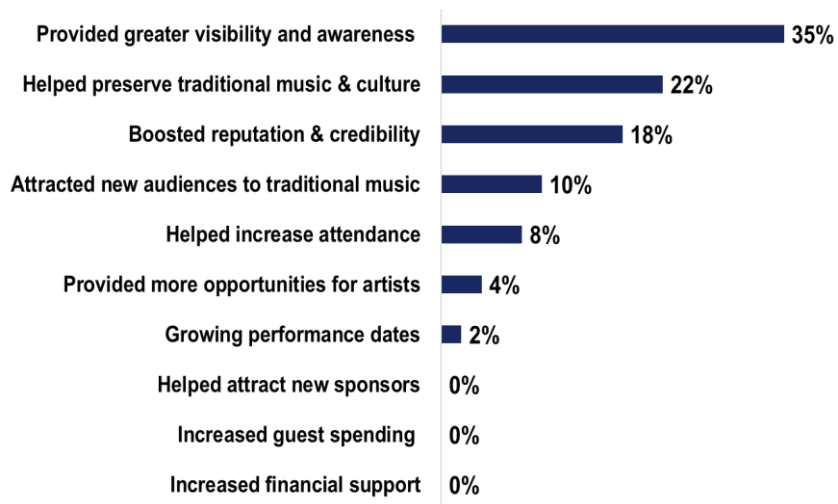


Among those respondents who believe BRMT has helped their organization at least somewhat, many cited the benefits provided to traditional music in general and the boost they believe they have received to their own event or venue reputation.



Those benefits to traditional music in general and the enhancement to their own reputation were also cited by respondents as the single most important ways that the BRMT has helped them.

Which of the following do you believe is the single most important way the BRMT has helped your event, venue, or organization?



Several respondents also provided additional commentary on the specific ways that they believe the Blue Ridge Music Trails has helped support traditional music at their event, venue, or organization:

- *By having Blue Ridge Music Trails signs on our site and an ad in "Down Home" magazine for Mountain Gateway Museum's free Sunday afternoon music jams, I think the museum here in Old Fort has gained both credibility and visitors. Our attendance fluctuates, and our audience remains mostly older adults, but we're hoping to both increase our numbers and broaden our audience in the future. We're looking into having a "Junior Appalachian Music" program.*
- *(BRNHA staff member) Dale Bartlett has written brilliant summaries and is very kind, lifting spirits and hope, and increasing visibility.*
- *The Down the Road publication is wonderful!*
- *Giving visitors an actionable way to experience music while in the area.*
- *The online support provided by the Blue Ridge Music Trails has given more exposure to music venues.*



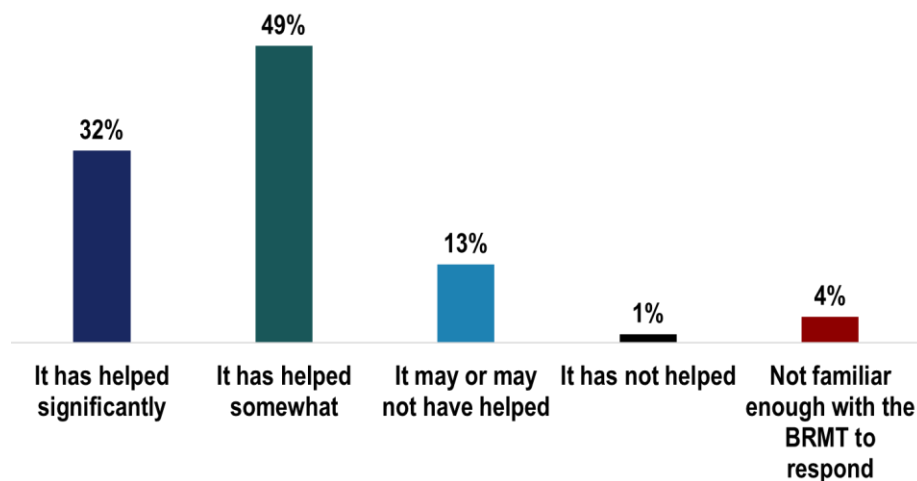
- *Helping to create a community of interest in traditional music through your website.*
- *The professional video was a great tool to promote our event that we did not have the resources for.*
- *Marketing western NC as a traditional music destination. Hayesville's traditional music sculpture, funded by BRNHA, continues to generate interest and is much photographed. Our Friday Night Concert series has attracted as many as 1,000 attendees on at least two nights this past season and averages approx. 450-550 per concert. The songwriter series at our Peacock Performing Arts Center, which hosts a number of traditional writers, had near or full sellouts in 3 of the 4 shows last year and have added a 5th date for the 2020 series. Hayesville's Festival on the Square, second weekend in July, showcases local and area traditional artists and continues to draw large crowds. Clay's Corner, in Brasstown, is open again and hosting jams weekly. All these events and venues benefit from the support and marketing of BRNHA. The economic impact to Clay County is substantial.*
- *We are a non-profit that supports early education. We feel having the support of the BRMT gives us clout and recognition that otherwise we might not have since we are not traditionally in this industry. Our event now has the reputation of being a major bluegrass event in our area, increasing our net proceeds tremendously. Thank you for your support!*
- *Cultural network provides vast opportunities for partnerships.*
- *Making the public aware of events and venues, as well as preserving traditional dance.*
- *Supported my venue through grant support. We now have a permanent venue to program traditional music.*
- *My event is an annual, one evening event so, I'm probably unique but, I believe the exposure provided by being on the trails has helped raise awareness of this historic event and certainly brings more credibility to our event, helping it to continue its 70-plus year tradition.*
- *Giving a face to the music.*



- *Being associated with BRMT has called positive attention to the Marshall Depot resulting in an increase in the number of out of towners visiting the Depot.*
- *Our audience recites the announcement with the announcer at our concerts.*

In addition to any benefits experienced by their own organizations, venues, and events, most survey respondents (81%) also believe that the BRMT has helped their *community* at least somewhat. This finding is important, because it helps demonstrate that traditional music and dance are thought to have benefits that go well beyond the venues that host these events and the organizations which are dedicated to the preservation of native North Carolina arts and culture. These benefits are observed by respondents in both measurables such as economic impact and intangibles such as community pride and preservation of a way of life.

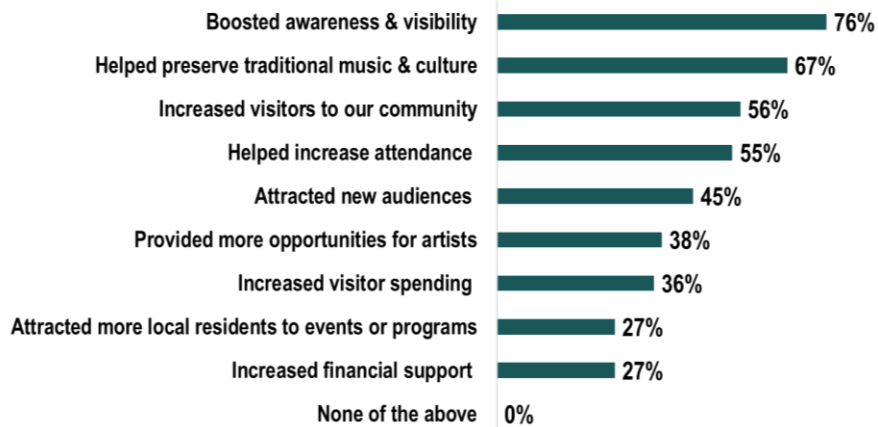
How much do you believe the Blue Ridge Music Trails program has helped your community?



Increases in awareness, visitation, attendance, and the overall preservation of traditional music were most often cited by those respondents who said BRMT had indeed benefited their community.

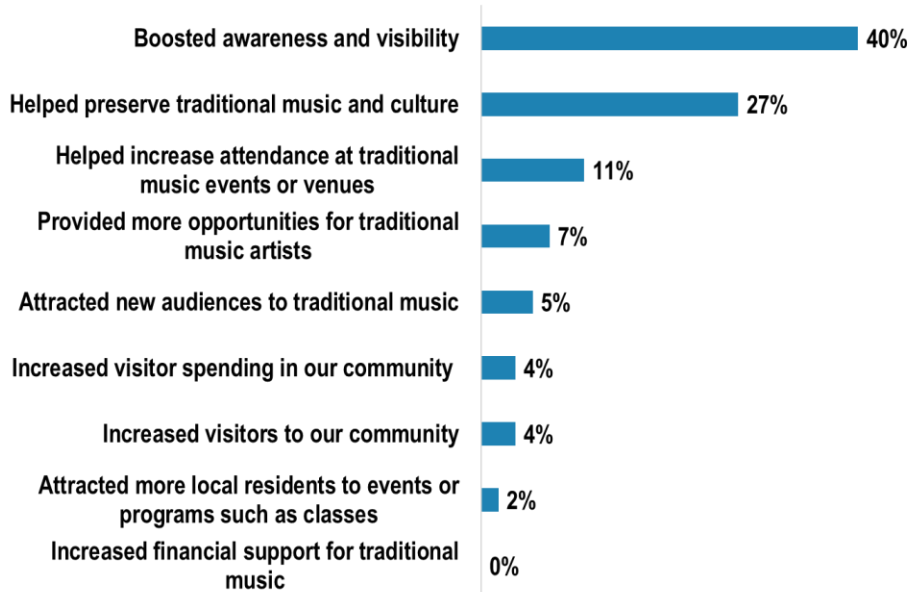


Respondents: Helped significantly/ somewhat



Respondents believe the most important benefits BRMT delivers to their community are increases in awareness and visibility and the preservation of traditional music and culture. These benefits are inherently important to many of these partner organizations, some of whom strive for visibility and support (financial or otherwise) even in their own hometown communities.

Which of the following do you believe is the single most important way the BRMT has helped your community?



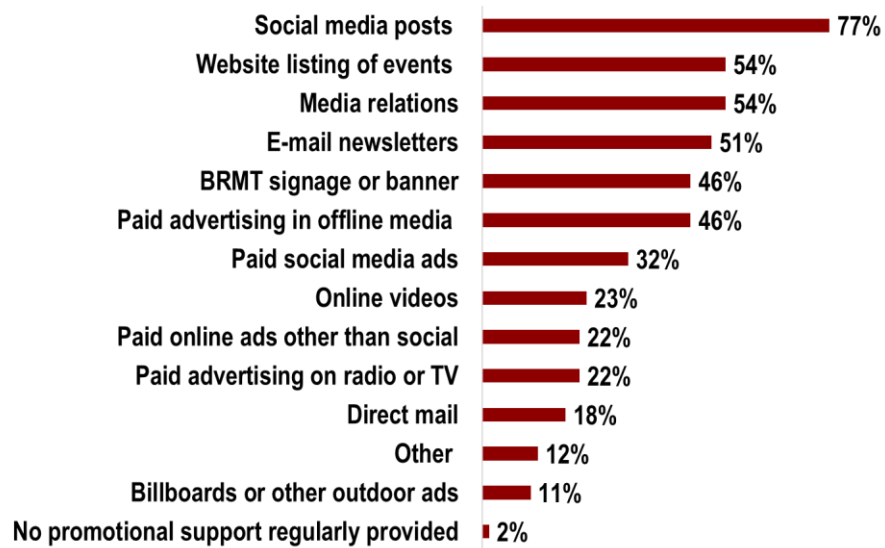
Several respondents also provided more detailed feedback on how the BRMT had positively impacted their community:

- *(BRNHA staff member) Dale Bartlett makes the scary part of feeling alone with a new event go away, by offering real support and encouragement.*
- *Increased attendance at local traditional events.*
- *Giving a voice/presence to small-scale operations with limited budget.*
- *Helping to create a community of interest and anticipation among residents and potential visitors through your website and publications like Down the Road.*
- *Several people have come with their booklets with them.*
- *It is great to have this tool/website that supports for folks looking for traditional music events.*
- *By increasing attendance at our venues and events, I think we went a long way toward accomplishing the other choices. They all result in benefits to Hayesville and Clay County, not only economically but in preserving the culture and heritage of the region.*
- *I think the calendar is a great "go-to" reference for locating music. Down the Road is a wonderful publication, too.*
- *This was like a "gold seal" of approval for our concerts.*
- *Giving tradition-bearers recognition goes a long way.*
- *Increased a sense of pride in our culture and traditions.*

When asked about what kinds of marketing media they utilize to promote their events and venues, respondents said they use a wide variety of approaches. Not surprisingly, social media was by far the leading use of a wide variety of media to promote themselves and traditional music, with over three-quarters of the respondents saying they use social media. Of course, with such a wide variety of organizations (and budgets) represented in the survey, a broad range of marketing activity is expected. But less than half of respondents said they took advantage of a free medium that has been provided to them—only 46% said they still displayed the BRMT signage or banner that had been sent to them at the launch of the program.

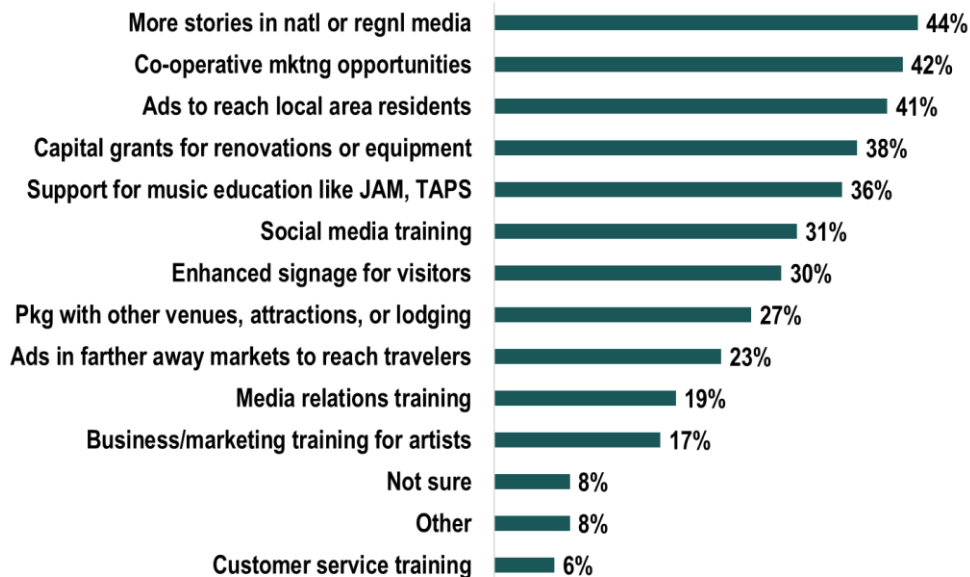


What kinds of promotional support for traditional music do you regularly provide?



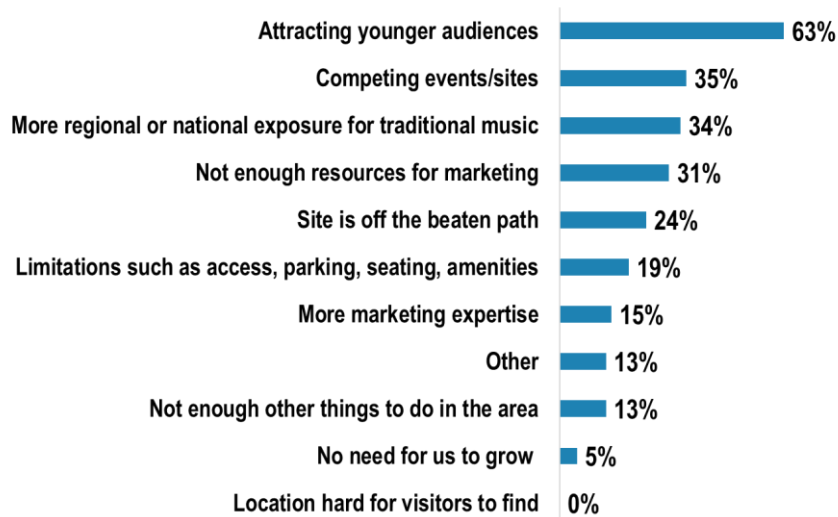
Media relations support, co-op marketing programs, promotion in their local communities, grants for capital projects, and additional financial support for music education were the most frequently desired kinds of support desired by survey respondents from BRNHA.

What kinds of additional support for sites on the BRMT would you like to see provided by BRNHA?



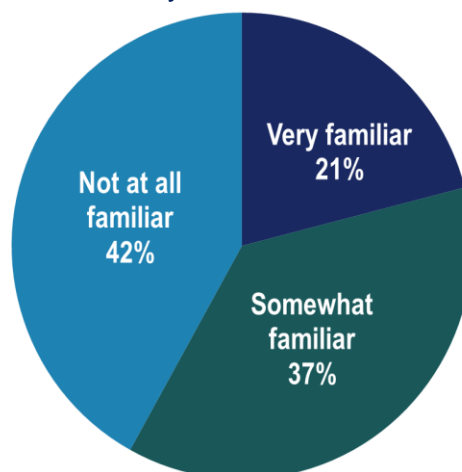
When asked about the greatest challenges that events and venues face in growing audiences for traditional music, respondents said that attracting younger audiences was by far the top challenge for the region.

What do you see as the primary challenges to growing visitation to our traditional music venue or event?



58% of partner respondents said they were at least somewhat familiar with the recent statewide music initiatives launched by the Department of Natural and Cultural Resources (DNCR) and the North Carolina Arts Council, The Year of Music and Come Hear NC.

How familiar would you say you are with 2019 being designated The Year of Music and the Come Hear NC project launched by DNCR and the NC Arts Council?



Respondents were provided with one final opportunity to submit other feedback about the Blue Ridge Music Trails and traditional music in the region, and they were generally very effusive in their praise for the Trails and BRNHA while also offering some additional input about the future focus of the program.

- *We are willing to do anything to keep the traditional music and dance alive in our town!*
- *Just specific praise to Dale Bartlett for ongoing excellence*
- *We appreciate the staff at BRNHA, and we believe in their effort to help us preserve traditional Appalachian art and traditions.*
- *Keep being amazing!*
- *Our mission is to preserve and present the traditional music, dance, and storytelling of the Southern Appalachian Mountains, and the BRMT helps us tremendously in promoting awareness of these traditions.*
- *I would like to see more discussion in various media about the special nature of music here. It isn't all bluegrass, but that's what visitors think of when the term traditional music is used. And if bluegrass is all that promoters talk about in order to get audiences, the subtleties that make old-time mountain music special will be lost.*
- *I think this is a great resource for our special area of the country. I applaud the work that you are doing and appreciate your willingness to work with artists, venues, and patrons to promote the resource!*
- *Grateful for the effort in supporting our rich music heritage. The investment shows support and adds credibility to our amazing musicians and our events. It enhances and lures folks wanting to be spectators and participants to our area. Keep up all the great work for our new generation of musicians. It's growing.*
- *It is a powerful authentic attractor to our region.*
- *Thanks for your support! If we could get more media attention about this special art form (Blue Ridge style shape-note singing) we would be very grateful. And, as already mentioned, we need youth to become interested and involved.*
- *Appreciate the support for our community theatre.*



- *We appreciate the work, planning and investments of Blue Ridge Music Trails of NC for increasing appreciation for NC's rich traditional music heritage.*
- *We are proud to be a BRMT affiliate and look forward to a great 2020!*
- *Thank you for all your ongoing activities.*

Interviews with BRMT Stakeholders

As a component of its assessment of the impact of the Blue Ridge Music Trails and to provide additional insight, in-depth telephone interviews were conducted with five BRMT stakeholders heavily involved in traditional music in the region:

- Tanya Jones, Surry Arts Council and the Earle Theater, Mount Airy, NC
- Phillip Trees, Fletcher Feed and Seed, Fletcher, NC
- Mary Beth Martin, Earl Scruggs Center, Shelby, NC
- Brownie Plaster, community advocate, Shelby, NC
- Stacy Guffey, Cowee Heritage Center, Franklin, NC

All the stakeholders interviewed were very complimentary of both BRNHA and the BRMT, with all citing the staff assistance provided to them as a great asset to their organizations and the region. Representatives of organizations which had previously received grants from BRNHA also praised the organization for its financial and technical support, and all said BRNHA's support in general for traditional music and dance in the region was invaluable to their organization and their communities. In fact, one stakeholder said that BRNHA had done more for their venue and traditional music in the region than any other organization, public or private.

This group of stakeholders was less able to cite specific elements of the BRMT initiative that benefited them or that they found particularly appealing, and sometimes confused the broader work of BRNHA in the region with the more specific mission of the BRMT. All of the stakeholders interviewed felt they had seen an increase in their attendance from visitors to the region, with an increase in international visitors being especially noteworthy.



Interestingly, all the stakeholders interviewed said they had seen an increase in younger audience members (especially college students) over the last few years, which they found encouraging for the future of traditional music. This sentiment contrasts with the results of the BRMT partner survey, where a majority of respondents said growing their younger audience demographic was essential to growing future visitation to their venues and events. Support for music education was another area cited by these stakeholders as an important part of BRMT and BRNHA, with all hoping for a continued focus and expansion of educational program support to ensure the survival of traditional music. One stakeholder specifically said they would like to see an emphasis placed on recruiting more instructors to their area through financial grants that would allow them to increase compensation to them.

Stakeholders also talked about the increase they feel they have witnessed in the quality of performers in the region and the number of artists from around the world who want to perform in western North Carolina, in order to play in some of the same venues and communities played by legends like Doc Watson and Earl Scruggs. Those interviewed believe that the reputation of the region as an authentic home of traditional music has been enhanced over the last few years and is now better known to a more global audience. A couple of stakeholders also mentioned the fortuitous, complementary timing of Ken Burns' PBS country music documentary (in relation to the work of BRNHA) and how it has brought more attention to the southern Appalachians as a cradle of traditional music in America.



Conclusions and Recommendations

The survey research among and interviews with Blue Ridge Music Trails partner stakeholders yielded several notable observations and actionable insights that BRNHA management can use to enhance its already-successful BRMT initiative:

- Overall, as measured by the results of the stakeholder survey, traditional music appears to be flourishing in western North Carolina. Many stakeholders reported strong attendance at their venues and events both in 2019 and since the start of the BRMT in 2013. This increase in attendance comes at a time of renewed interest nationally in traditional music, and when much of western North Carolina has experienced a tourism boom. BRNHA deserves much credit for helping make this happen.
- The percentage of survey respondents who perceive they have seen an increase in out-of-area visitors (66%) demonstrates that increase in regional tourism, but also speaks to the appeal of traditional music and dance in western North Carolina among visitors who have more options than ever for how they spend their money and time. This finding is especially noteworthy given that respondents represent a broad range of events and venues, some of which have relatively low awareness outside of the region. The increase in visitors supports the importance of the BRMT as a regional driver of the awareness of cultural traditions and how to access them.
- Although there is no single specific metric that directly leads to this conclusion, awareness among Blue Ridge Music Trails partners of what the BRMT involves as a program initiative appears lower than it should be, given the nearly universal appeal among stakeholders of what BRNHA does to preserve native culture and the importance of traditional music in the region. The BRNHA should make more of its support (financial and technical) tied to the BRMT specifically and not the Heritage Area in general. (“This support provided by the Blue Ridge Music Trails, an initiative of the Blue Ridge National Heritage Area.”) Almost everyone praises the



marvelous overall support of the BRNHA, but few partners can recall detailed support provided via the Music Trails program.

- The relatively low number of partners who say they regularly display BRMT banners or related signage is a concern and can be interpreted as another sign of a lack of awareness of how BRNHA actively supports traditional music and dance. It is also possible that many of the event and venue partners have misplaced their signage since 2013 or had it “appropriated” by fans. In either case, it may be time to reach back out to BRMT sites to see which ones need replacement signage or need to be reminded of the importance of its display—as a brand reminder, cross-marketing tool, and reassurance to the visitor that the event or venue has the BRNHA “seal of approval.”
- An annual BRMT-branded regional partner event would also build awareness among stakeholders, the media, and the public. The annual “Gather ‘Round the Blue Ridge” program has similarly helped build awareness of everything BRNHA does as a grassroots organization among partners and government officials. There may be a similar opportunity to do a traditional music-themed event each year or to rotate an event with “Gather ‘Round the Blue Ridge” and/or a Blue Ridge craft-themed event. Indeed, BRNHA should consider an annual or biennial event for BRMT partners that celebrates the initiative, provides a program update, offers education, and reminds them of various opportunities available to them and the expectations of all partners (to display BRMT signage, etc.).
- Some partners have suggested BRNHA stage an annual BRMT festival or event as a means of driving consumer awareness and rallying the region around support for traditional music. This event would be held at a central location each year or rotate to different venues around the BRMT region to draw attention to community efforts to preserve and celebrate cultural traditions and local artists. The media opportunities from such an event could be substantial, particularly if it featured out-of-region guest performers or was broadcast on a network like PBS. However, this event could also be viewed as competing with the existing partners that BRMT



attempts to showcase and would also require a great deal of time and resources from BRNHA to execute.

- Given the concern expressed by many survey respondents about the need to grow attendance at traditional music events and venues among younger audiences (even though the interviewed stakeholders expressed optimism about this audience), BRNHA should consider holding a dedicated workshop or similar event for BRMT partners that specifically addresses this topic. This event would include the sharing of success stories by those venues and events that feel they have grown that segment of the market and presenting experts in fields such as social media and experiential design who can offer practical advice on how to appeal to younger audiences.
- Financial and technical support for traditional music and dance education continues to be one of the most popular programs offered by BRNHA as a means of enhancing the popularity of the genre and preserving local culture in western North Carolina communities. The ability of BRMT communities to deliver upon this promise, however, likely varies and is subject to several factors, including the availability and willingness of a local sponsor organization, the availability of local instructors, and the demand for such programs. BRNHA should build upon the grassroots appeal of programs like Junior Appalachian Musicians (JAM) and look for opportunities to build consistency and sustainability across more communities.
- While it was not specifically queried in the survey research, the need for the growth of pre-formed tour groups as a core venue or event audience did not arise as much as expected. There are practical limitations in many places that inhibit the appeal of groups as a sizeable audience for some events and venues, such as the lack of staff to coordinate group visits, the size of and available seating at the venue, a lack of amenities (food and beverage, appropriate restrooms, etc.). However, this segment may be a growth area for the BRNHA's support of certain BRMT partners given the interest in traditional music and the prior experience of BRNHA in the group tour market.

