



Executive Summary

Analysis of Traditional Music Venues in Western North Carolina

Western North Carolina has a national reputation as a music-rich region and its traditions of old-time string band music, ballad singing and bluegrass are internationally renowned. The artistry of musicians from this region has shaped many forms of American music.

North Carolina's distinctions in traditional music draw people to the state, not only for entertainment in the beautiful, lush settings of the mountains, but to appreciate the places that had significant influence on the development of iconic American music. Mountain music events celebrate the origins of folk festivals, fiddle and banjo ensembles, ballad singing and team square dancing. Intimate personal connections with traditions like these happen through such experiences as hearing the ballad of Tom Dooley in the very spot its lyrics describe or sharing the energy of young musicians learning from their elders. Traditional music in western North Carolina touches people, motivating them to travel great distances, and even to move to the region. The sense of place in the Blue Ridge region is an important audience draw.

In order to gauge the economic impact of traditional music venues, the North Carolina Arts Council and the Blue Ridge National Heritage Area Partnership jointly sponsored this study. The study was conducted in 2011 in 18 counties that are part of the Blue Ridge National Heritage Area.

Data was collected from audience surveys at 26 selected events that are part of the Blue Ridge Music Trails project. Folklorists also collected anecdotal information from interviews with participants to help contextualize the data. People told stories about prior experiences with the venues, a personal love of Appalachian music and why they made the journey to experience the music first-hand. This information led to a deeper understanding of the many different audiences present at traditional music venues, from multiple generations of local regulars, to a growing population of retirees and second homeowners, to visitors from as far away as Australia.

The events that were included in this study play an important role within Western North Carolina and the Blue Ridge Mountain region. A total of \$20.7 million in economic impact is associated with the 26 events, documenting that traditional music is a significant sector of the Creative Industry. This research confirms that traditional music contributes to community identity and returns economic value. This study quantified only the economic impact of 26 surveyed venues on the dates they were surveyed. Because many of the events recur throughout the season or year and because there are more than 150 traditional music events in the region, the total economic impact of traditional music venues in Western North Carolina is likely to be much greater.

The Blue Ridge Traditional Music venues study shows the significance of traditional music venues and sites as valued social spaces, and music itself as a meaningful part of people's lives and an important facet of the region's cultural identity for both residents and visitors. Traditional music is particularly important to western North Carolina's tourism economy.

The sites included in this study are diverse, ranging from intimate, local spaces to some of the largest music festivals in the country. The audience also varies, from teenagers picking up the fiddle for the first time to flat-footers in their 90s; from first-time visitors to our country to people who have lived in the same community for generations. A majority of the attendees were European-Americans and were 55 years or older. While there is a lack of ethnic diversity at bluegrass and old-time events, these audiences were not homogenous. Participants varied in income levels and educational background, as well as point of origin.



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People in this study said that the music of Western North Carolina is an important part of the state's cultural and historical identity, as well as their own. These events create satisfying experiences for both visitors and local community members. Respondents indicated that they planned to return to the same events next year and were happy with the event venues/locations. Blue Ridge Music experiences provide an important service to local residents attending the events and also serve to initiate or provide a positive orientation to first time visitors to the host communities.

The venues in the study were only a sampling of the more than 150 traditional music events in the region. A total of 512 surveys were completed by audiences of these events, a sampling from the more than 116,000 estimated total attendees at these events on the days the surveys were collected.

Selected findings include the following:

- Nearly 70 percent of survey respondents indicated that they were full time residents of N.C., and 65% of these were from western N.C.
- Nearly 40 percent indicated that the primary purpose of their visit was to specifically attend the music event where they were surveyed.
- Residents from 10 different states were also represented in the sample. Visitors from outside the venue location spent an average of 2.9 nights in the region while attending the events where they were surveyed.
- Respondents tended to be mature. More than 50 percent were older than 55 and nearly 75 percent were older than 45. Respondents were also highly educated with well over half the sample having at least a four year degree, and more than 25 percent having an advanced degree. Nearly all sample members (95 percent) reported their ethnicity as Caucasian.
- Findings indicate a high level of satisfaction because respondents stated their intended behavior to return to the same event next year. Overall 99 percent of the sample stated that they intended to return to the same event the following year, and for each individual event at least 93 percent indicated that this was true. This response indicates a high level of satisfaction with the events specifically and likely with the venues/communities in which the events were held.
- If these events were not held, 65 percent of survey respondents indicated that they would have traveled to another community to attend a different event.
- The majority of the sample indicated that they participated in the arts/music and were also influenced by North Carolina's musical traditions.
- The \$18.6 million of direct economic impacts, along with the \$972,611 of indirect impacts, and the \$1.2 million of induced impacts combine for a total of \$20.7 million of total economic impacts associated with these 26 events. This is a substantial contribution to the region.
- Since all of the spending that was reported on the surveys was associated with the events, not holding these events would have resulted in a loss of 65-percent of the impacts or \$13.5 million to economies of the various communities that hosted the events.
- A typical community event can be expected to return more than \$4,000 for every 100 visitors attending.



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