



MEASURING FOLK

Audience Research Initiative 2018-2019

FOLK ALLIANCE INTERNATIONAL

*to this
more free back too*

not wide ea

In Context

Folk Alliance International (FAI) is a non-profit 501c3 organization based in Kansas City, Missouri, USA. Its mission is to serve, strengthen, and engage the global folk music community through preservation, presentation, and promotion.

Founded in 1989, FAI is an advocacy, professional development, and networking organization with over 3,000 members worldwide including artists, agents, managers, labels, publishers, publicists, manufacturers, media, and festival/venue/concert presenters.

FAI represents a broad, contemporary, and international iteration of the folk music genre, encompassing Appalachian, Americana, Blues, Bluegrass, Celtic, Cajun, Francophone, Global Roots, Hip-Hop, Indigenous, Latin, Old-Time, Traditional (Trad), Singer-Songwriter, Spoken Word, Zydeco, and every imaginable fusion.

FAI produces the International Folk Music Awards, the Ethno USA program (on behalf of JM International), an Artist in Residence program, The ExChange (a market-development program), a Global Summit series, the Louis Jay Meyers Music Camp, the monthly Folk Chart, and the world's largest annual conference for the folk music industry. FAI also provides a range of member benefits including a Group Exemption program for U.S. non-profit organizations, a work visa referral letter service for foreign artists, and a P.R.O. House Concert Agreement program.

FAI has five regional affiliates that produce conferences in their respective markets: Southwest Regional Folk Alliance (SWRFA), Folk Alliance Region Midwest (FARM), Southeast Regional Folk Alliance (SERFA), Folk Alliance Region West (FAR-West), and Northeast Regional Folk Alliance (NERFA), in addition to a Nordic Folk Alliance serving Northern Europe.

Contents

Why Folk Research?
page 3

The Research Process
page 4

Methodology
page 4

Key Findings
page 8

What's Next?
page 11

Credits & Contacts
page 12





WHY FOLK RESEARCH?

In this digital music era, data plays a major role in decision making. At first, the music industry was slow to reap the benefits of a digital age. It took over 20 years for systems and hierarchies to change. The industry reorganized with artists at the center, labels became service organizations, and through email and social media, fans gained direct access to artists. Ability to record and release music directly to the public has changed the way music is delivered and discovered; the speed, the volume, the metrics.

Folk music has always operated close to the audience. It has been nimble and well equipped to navigate change in this new landscape and ahead of the curve because it was already operating the way music would become. Managers, labels, publishers and royalty collection organizations are developing increased capabilities leveraging data in everything they do, and so must folk music.

FAI is often asked if there are statistics about folk music from people who want to know more about the “who” and “what” about FAI. This includes:

Radio DJs and Program Directors ask for statistics about the folk audience. Such data could be used to keep their programs on the air or move to a better broadcast slot.

Festivals ask for economic impact data, or if we know methods to measure it. This information is important for their appeals to city, state, and tourism organizations.

Advocacy groups ask for demographic data about artists. This information (including wages, ticket sales, health insurance status, travel) can attract funding, services, and support for our community concerning gender equity, fair pay, immigration, health and financial security.

FAI Executive Director Aengus Finnan (and Louis Meyers before him) passionately advocated for folk music with international awards organizations (GRAMMY[®]s, JUNO[®]s),

music platforms (Apple, Amazon, Spotify), and chart and research organizations (Nielsen/Soundscan, Billboard, and BuzzAngle). While these conversations take place “behind the scenes,” they are critical in ensuring folk remains a prominent genre category in music discovery platforms and industry-influencing sources. Data informs and emboldens this dialogue.

The folk music community is a feisty lot that enjoys vibrant debate and is proud of its uniqueness, values authenticity, and encourages free speech and storytelling. Folk music has a history, full of myths and legends, based on shared experiences. Some of those myths have become threaded in the fabric of the community, and are evident in the decisions about programming, benefits, and how it serves.

But some questions deserve unpacking...

- **Is folk music niche? Who is its audience? What is its commercial footprint and potential?**
- **The folk music community is committed to having a “big tent”, naturally welcoming to newcomers and non-judgmental. But has it always been that way? Is it truly now? How can it welcome more and do better?**
- **Some say the folk audience is aging. Why do they think that? Is it true? What is the relationship between generations and how can that relationship get the best of our community?**

Though the folk community is diverse in many ways (some visible and some invisible) it is our common love for music that brings us together.

FAI determined it was time to bust or affirm the myths, and to understand our community with more certainty, and less assumption by conducting stakeholder research to make data driven decisions.

THE RESEARCH PROCESS

The FAI board and staff discussed the need for research and further insights into our community for many years. Every year, conference surveys are collected but only reveal the tip of the iceberg on what could be learned. In February 2017, the board established a Research Committee to explore the subject. This group included three non-board members ensuring outside perspective with extensive experience with research and data analysis.

In May 2017, the entire board, along with FAI's Executive Director and Director of Operations, met at the very location where the organization was founded - Camp Hess Kramer in Malibu, California. The group undertook a brainstorming session co-facilitated by Membership Chair Erika Wollam Nichols and Research Chair Michelle Conceison. The board considered a broad list of folk constituencies, broke off into groups, and came up with ways data could improve conditions for those constituencies. They then rejoined to share and discuss every idea in detail as an entire group generating even more ideas.

The Research Committee took that long list, added to it, and presented the board and staff with a survey requiring them to rank each idea in order of urgency/priority. These rankings allowed the Research Committee to see what the board and staff felt were the most important areas to study/pursue, at least initially. Those priorities informed

the content and language of a Request For Proposals (RFP) FAI sent out to research firms specializing in stakeholder and arts research.

The RFP was issued in February 2018 and five proposals were received. The Research Committee reviewed and followed up on all proposals, provided recommendations to the board, with the board selecting finalists in April 2018. The finalists made their presentations at the June board meeting in Raleigh, North Carolina. Nationally renowned firm Slover Linett Audience Research Inc. was chosen and began work in July 2018.

In late August and early September 2018, Slover Linett conducted a series of qualitative telephone interviews with a diverse range of key FAI stakeholders. A survey was then developed and sent out in October 2018, with responses collected into November. The Research and Executive Committees received initial findings from Slover Linett in December 2018 and shared them with the board on a January 2019 call.

In February 2019, Slover Linett joined the FAI board during the Montréal edition of FAI's annual conference to present their findings in detail and discuss future research plans. Highlights of the initial results were presented during FAI's Annual General Meeting (AGM) by Research Committee Chair Michelle Conceison.

METHODOLOGY

This first research phase was designed to reflect on the past, present, and future, and to unearth the attitudes and aspirations of the community.

In order for future research to build on the initial observations and baseline data, best-practice research methods were established, striving to be as inclusive as possible of the folk community as it currently exists. As such, FAI did not attempt to define "folk," but rather worked to detangle and articulate key connective ties that bring the field together, and to identify challenges the community is facing.

The folk community and music industry beyond FAI membership was intentionally included to achieve a more complete picture of the field.

The following research goals were established:

1. Encourage the folk community to self-reflect and engage in a deeper understanding of itself;
2. Continue to build meaningful conversation and collaboration between folk artists, presenters, and industry;
3. Lead a responsive dialogue about the evolving state of the folk field.

Truly pursuing these goals meant needing to create a framework to listen. Once the questions started to be asked many people came forth willing to share their viewpoints. To encourage participation, a listening process had to be established.

Our first phase of research was delivered in two steps:

Step 1: In-depth Qualitative Interviews

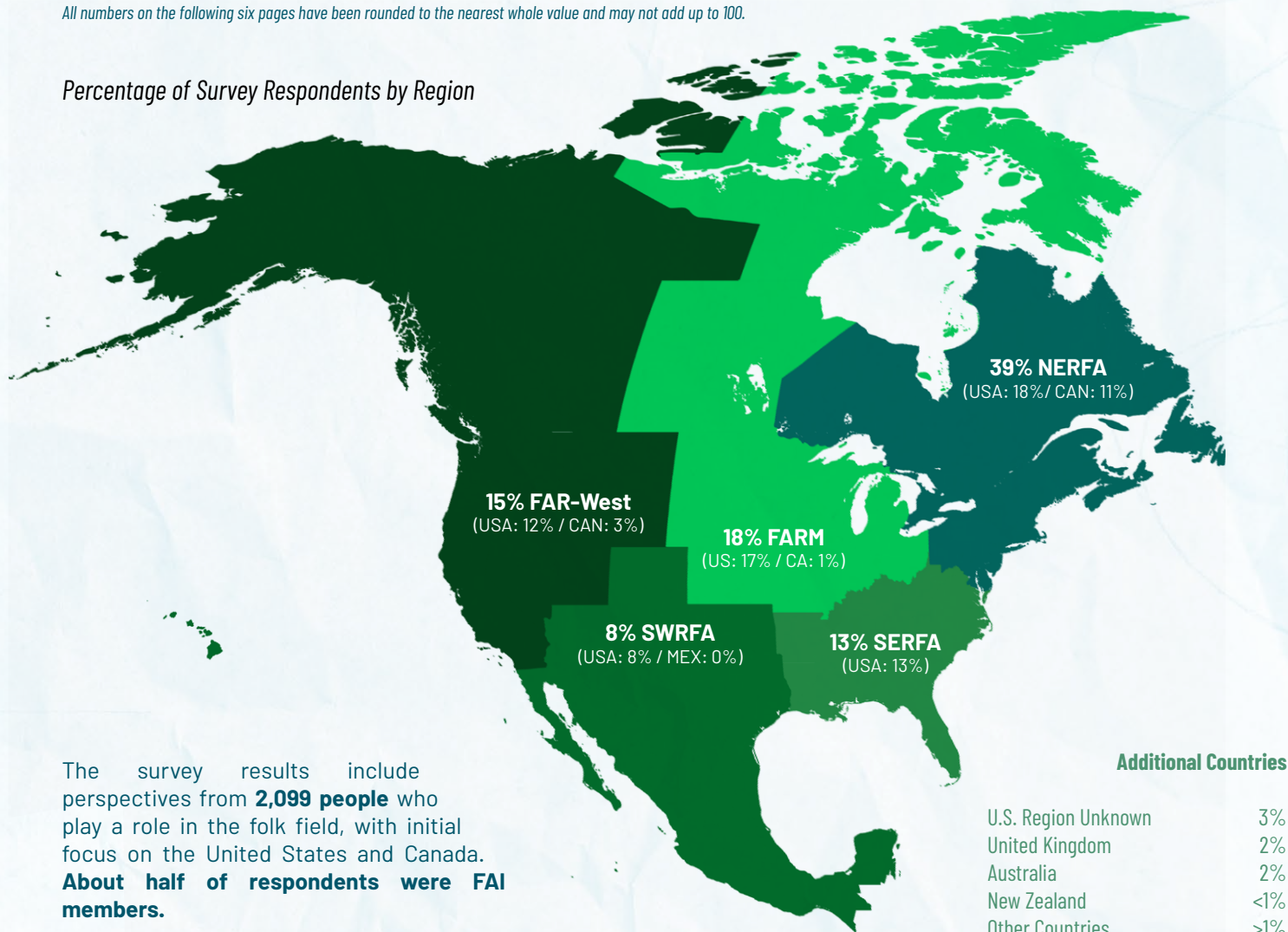
- Conducted by phone with participants, including folk thought-leaders representing festivals, venues, artists, managers, agents, and other music organizations.
- Interim discussion of themes and implications in preparation for survey development.

Step 2: Online Quantitative Survey

- FAI sent a survey to current and past members, event attendees, and partner organizations. Recipients were asked to share the survey with their networks to reach a broad sample of people.
- Report presentation and in-person discussion with FAI staff and board.

All numbers on the following six pages have been rounded to the nearest whole value and may not add up to 100.

Percentage of Survey Respondents by Region



The survey results include perspectives from **2,099 people** who play a role in the folk field, with initial focus on the United States and Canada. **About half of respondents were FAI members.**

The results breakout was consistent with the geographical map of FAI's current membership:

	NERFA	FARM	FAR-West	SERFA	SWRFA
Current FAI Membership Ratio	1,810 members 40%	884 20%	757 17%	583 13%	453 10%
Survey Participants Ratio	39%	18%	15%	8%	13%

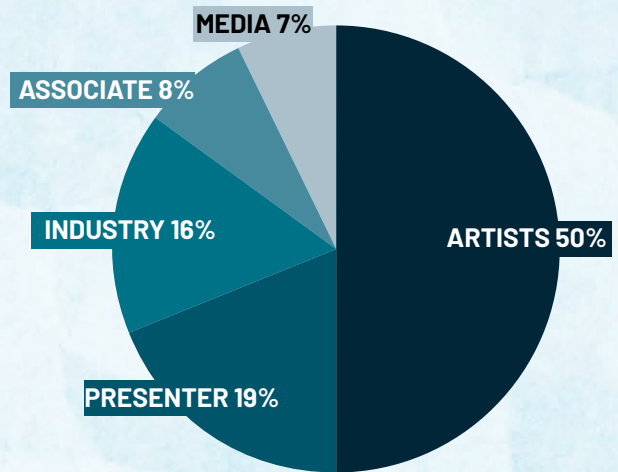
Additional Countries

U.S. Region Unknown	3%
United Kingdom	2%
Australia	2%
New Zealand	<1%
Other Countries	>1%

Survey Respondents Breakdown

The findings represent a wide range of roles, ages, educational backgrounds, and gender; however, most respondents identify as white.

Responses skewed older and 50% were artists. This does not necessarily indicate that this ratio is reflective of the makeup of the broader community. The research firm stated that it may mean these members of the community are more motivated to respond to a survey.



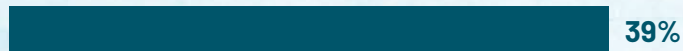
HIGH SCHOOL / GED OR LESS



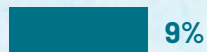
SOME COLLEGE/UNIVERSITY



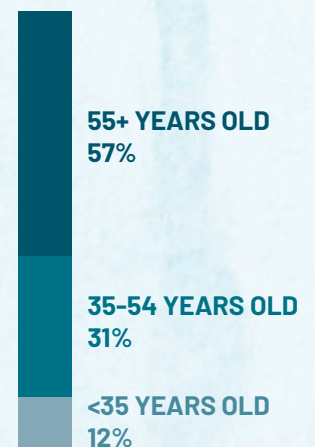
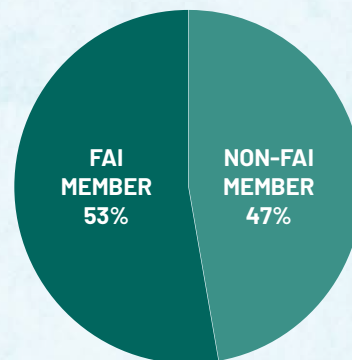
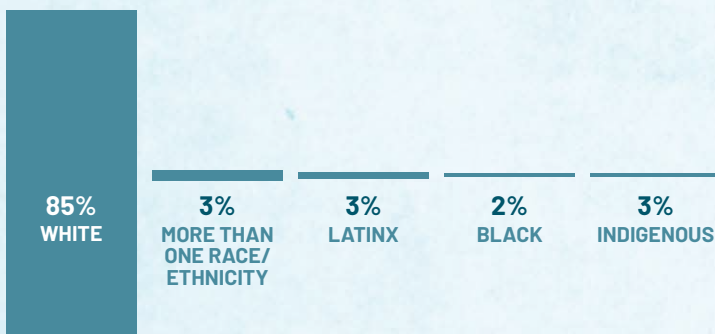
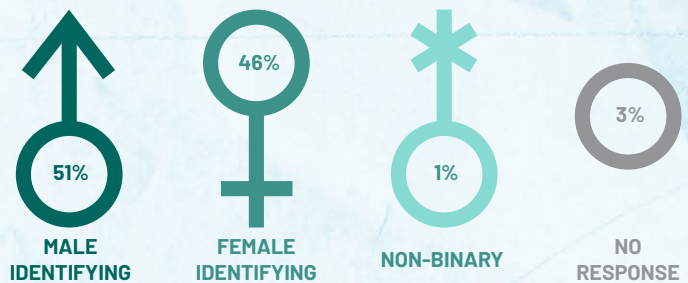
COLLEGE/UNIVERSITY DEGREE



SOME GRADUATE WORK



GRADUATE/POSTGRADUATE WORK





The survey used the same role categories as used by FAI for conference delegates to self-identify. A mix of people was heard from with slightly different demographic characteristics.

Most roles revealed gender parity, except media which was 32% female.

Presenters (festival, venue, or concert programmer) identified as the most educated and most likely to be FAI members.

Those in artist or industry roles are generally younger than those in presenter, media, and associate roles (who are usually age 55 and older).

ARTIST



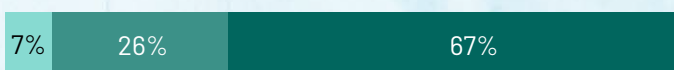
ASSOCIATE



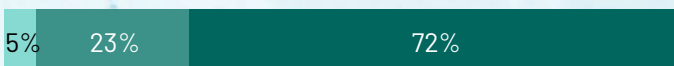
INDUSTRY



MEDIA



PRESENTER



Under 35 years old 35-54 55 and older

ARTIST (1,046 / 2,099)

54% are current FAI members

45% identify as female

27% have a graduate or postgraduate degree

ASSOCIATE (161 / 2,099)

39% are current FAI members

49% identify as female

45% have a graduate or postgraduate degree

INDUSTRY (346 / 2,099)

55% are current FAI members

52% identify as female

26% have a graduate or postgraduate degree

MEDIA (137 / 2,099)

40% are current FAI members

32% identify as female

30% have a graduate or postgraduate degree

PRESENTER (409 / 2,099)

58% are current FAI members

47% identify as female

40% have a graduate or postgraduate degree

KEY FINDINGS

A Passionate Pursuit

More than one third of respondents consider folk to be a key part of their personal identity, with 73% saying they work mostly or entirely in folk music.

To what extent do you agree with the following statements?
(% indicating Strong Agreement)

Folk music is a key part of my personal identity

39%

I am heavily involved in the folk community

27%

I spend my free time engaged in activities that center around folk music

23%

Folk is a lifestyle for me

22%

Most of my friends are a part of the folk community

19%

- Artists (of any age) are more likely to personally identify with folk than those in other roles in the field; almost half (44%) feel folk is a key part of their personal identity.
- Artists are the most likely to say they work in multiple genres (69%).
- People age 55 or older are more likely than younger people to consider folk a key part of their personal identity (46% versus 35%, respectively).
- FAI members feel more supported by the broader folk community than non-members.

Many Hats Are Worn

Based on data collected annually from conference attendees FAI is aware that many people hold multiple roles in the folk community, but it had never been examined before now. The research revealed that multiple roles were not an anomaly, undertaken by the more ambitious; rather, they are the norm.

Secondary Roles of Each Primary Role

ARTIST

Presenter 18%
Industry 20%
Associate 13%
Media 5%
Artist 3%
None 42%

ASSOCIATE

Presenter 24%
Industry 6%
Associate 24%
Media 2%
Artist 21%
None 33%

INDUSTRY

Presenter 18%
Industry 28%
Associate 9%
Media 5%
Artist 12%
None 26%

MEDIA


Presenter 19%
Industry 28%
Associate 9%
Media 19%
Artist 16%
None 9%


PRESENTER

Presenter 16%
Industry 13%
Associate 24%
Media 5%
Artist 16%
None 27%

Connection Is At The Core

The folk field generally shares a vision for the central values of folk; they strongly feel it provides a means of connection, both in time (e.g., past and present) and between people (e.g., artists and influence.)


 "I think of folk music like folk art. Not necessarily following formal convention or teaching. A self-taught or person-to-person tradition."
- Presenter, 35-54 years old

 "It's only folk in my mind if the roots are showing, regardless of the garden in which those have developed."
- Artist, no age provided



 "Folk involves a commitment to social change by giving voice to societal critiques."
- Artist, under 35 years old



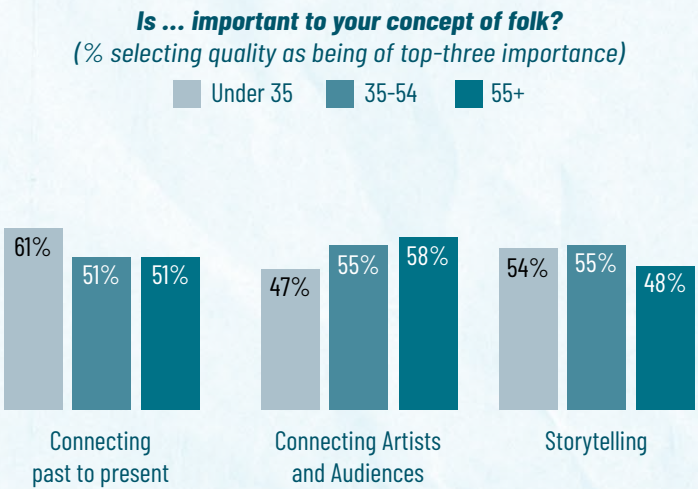
 "Folk is a music built upon a simple framework that allows the participation of musicians of various skill levels, with room for the expression of experts while including beginners."
- Artist, 35-54 years old

 "Folk is a beautiful way to honor our ancestors while connecting on a one to one level with other cultures. It's really the perfect way forward for the modern 21st century world citizen."
- Artist, 35-54 years old

Relating to Our Past and One Another

There are many values that are shared, and that was evident in the study results. But even when values are shared, it is compelling to consider the relative priorities of people with different backgrounds. Interestingly, in this research, distinctions are seen in how different age groups perceive the central values of folk.

Evidence was found of shifting priorities at different times in life. This could be generational (specifically related to social conditioning and events of the times of each generation) or it could be related to life stage (repeatable based on the aging process). Further inquiry would need to be conducted to really know.




Aspiration Versus Reality

The folk field largely values inclusiveness and different perspectives, but community members are well aware that their self-defined folk community falls short in reflecting the diversity that they idealize.

Again, the community overwhelmingly expressed belief in all of these values (over 60% of respondents thought these elements were important). Some were more important than others, which can lead to a better understanding of community perspectives.

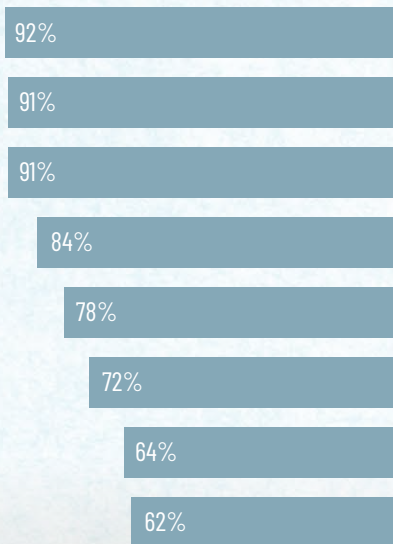
Younger respondents were especially supportive of values of inclusivity. They were also particularly sensitive to a lack of existing diversity in the folk field, particularly racial and economic diversity.



“Outside of major metropolitan communities, folk music needs to change. It is still white people hiring white people to sing songs in front of white people, who want to hear songs about diversity.”

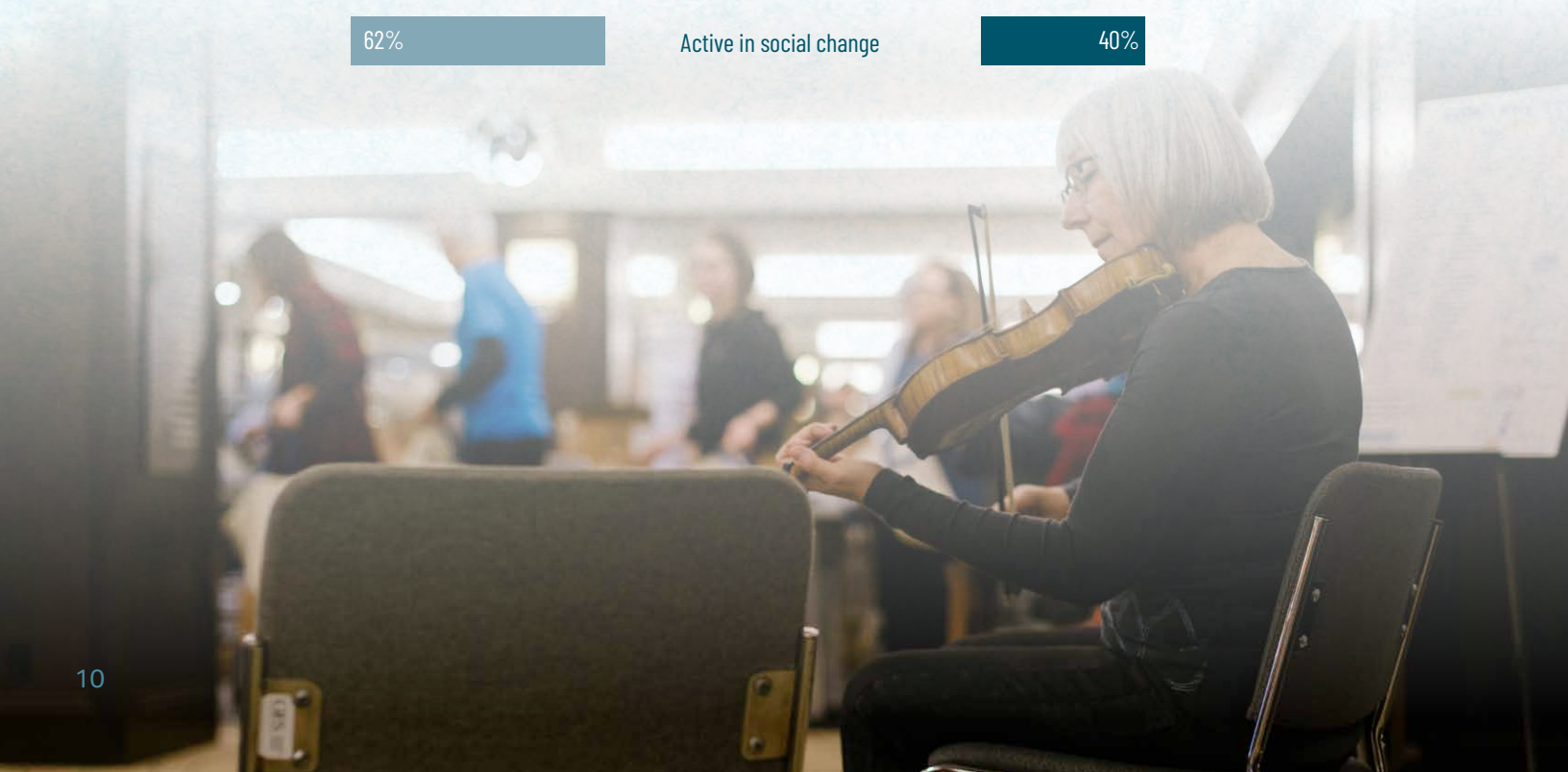
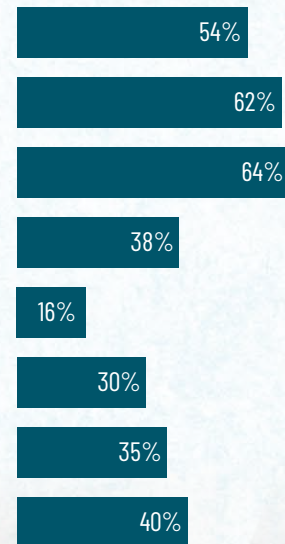
– Artist, 55 years old or older

How important do you think it is for the folk community in the future to be... (% indicating Strong Importance)



- Welcoming of newcomers
- Supportive of each other
- Accepting of cultural differences
- Representative of all ages
- Racially diverse
- Socio-economically diverse
- International
- Active in social change

How accurate are the following statements for the folk community that you interact with today? (% indicating Strong Importance)



WHAT'S NEXT?

The first phase of research unearthed several possible directions of future inquiry. Among the questions...

Who is the Folk Audience?

While people in the folk field share a sense of community and common values, they do not have a clear sense of who their audiences are, or what those audiences want. Survey responses were tentative, indecisive, and conflicting, indicating that further study is needed to fully understand perspectives about audience. More importantly, it indicates the inquiry should not just be about current folk audiences but should explore the potential audience of folk as it continues to evolve and grow.



Are We Thriving Or Just Surviving?

People in the folk field perceive their greatest challenge to be the financial aspect of the industry, especially artists and older members of the folk field. This, too, warrants further study.

What Is FAI's Role?

The folk field perceives FAI's primary role as connecting artists and industry. It remains important to the board and staff that community input inform its mission and activity.

Slover Linett identified three areas of further study:

1. **Generational** - further understand relations between different age groups in our community, the impact it has on the fabric, member needs, and FAI services
2. **Audience** - further understand the folk audience, both those who self-elect as fans and those who may be more passively consuming, following, and sharing folk music
3. **Economic Impact / Industry** - quantify the economic impact folk organizations, events, and artists have on local ecosystems by understanding how money and resources flow through the community

And now, the Research Committee is designing a further study that can be piloted by FAI and replicated by regional and local organizations. FAI is identifying potential funding sources for the next phases, and endeavoring to build support for folk research by sharing these initial results at industry events, conferences, and research conventions.



CREDITS

Research Committee

Michelle Conceison, Founding Manager, Market Monkeys (FAI Research Committee Chair, 2017-18)
Erika Wollam Nichols, General Manager, Bluebird Cafe (FAI Membership Committee Chair, 2017)
Erin Benjamin, President & CEO, Canadian Live Music Association
Linda Fahey, Senior Director/Producer, Folk Alley, WKSU 89.7 FM
Aengus Finnan, Executive Director, Folk Alliance International
Amy Reitnouer, Co-Founder/Executive Director, The Bluegrass Situation
Matthew Smith, Managing Director, Club Passim
Kristin Thomson, Executive Director, Future of Music Coalition

FAI Staff Project Team

Aengus Finnan, Executive Director
Jennifer Roe, Director of Operations
Erika Noguera, Communications Manager (through February 2019)

Slover Linett Audience Research Inc. Project Team:

Peter Linett, President
Tanya Treptow, Vice President and Co-Director of Research
Michelle Ernst, Senior Researcher
Chloe Chittick Patton, Senior Advisor

MEASURING FOLK: AUDIENCE RESEARCH INITIATIVE 2018-2019

Produced by Folk Alliance International (FAI)
Research conducted by Slover Linett Audience Research Inc.
Funding provided by Grassy Hill Education Fund

Lead Author: Michelle Conceison
Editors: Aengus Finnan, Jennifer Roe, Kelly Dougherty, Joan Kornblith, Tanya Treptow, Michelle Ernst
Design and Layout: Fawn Lies

FAI retains full rights to all content in this report. FAI encourages the dissemination, use, and sharing of information in this report (with the exception of any photographs, logos, branding, or trademarks where otherwise indicated) provided Folk Alliance International is attributed.

Published: November 2019

For further information, contact:

Folk Alliance International, 601 Avenida Cesar E. Chavez, Suite #100, Kansas City, MO 64108, USA
816-221-FOLK (3655) • fai@folk.org

FAI's office is located in Kansas City on the traditional land of the Kansa and Osage nations. FAI acknowledges that all of its activities and that of its North American member organizations take place on ancestral Indigenous lands. *The purpose of making this land-acknowledgement in post-colonial society is to show respect for Indigenous peoples, recognize their unique culture and enduring relationship to the land, and raise awareness about histories that are often suppressed or forgotten.*

