

Multi-Site Survey of Current and Prospective Jazz Ticket Buyers
Executive Summary
June 2011

The Jazz Audiences Initiative was launched in November 2009. The project was designed to study fundamental questions about how and why people engage with jazz. The main goal was to learn new ways for engaging audiences, and infusing the art form with new energy. Electronic and print survey protocols, were administered between August 2 and October 31, 2010.

The research was conducted by WolfBrown, www.wolfbrown.com, with support from the Doris Duke Charitable Foundation, Ohio Arts Council, **Error! Reference source not found.**, and the Columbus Foundation.

JAI is the catalyst to:

1. Collect and analyze attitudes and behaviors of jazz ticket buyers across the U.S.
2. Examine music preferences and concert-attendance trends in central Ohio.
3. Combat the idea that jazz is dying or that supply of the music is too high.
4. Generate ideas for meaningful involvement opportunities (programs, venues) that speak to a larger, younger constituency, and eliminate barriers to participation.
5. Develop and test the persuasiveness of new messages/language designed to motivate current and potential jazz audiences.
6. Create a learning community for jazz professionals.
7. Position JAG and Columbus, Ohio at the forefront of a national conversation about the future of jazz.

Market Segmentation Research on Current Jazz Ticket Buyers

The National Survey of Jazz Audiences was launched electronically to a random sample of several thousand jazz ticket buyers in six cities across the country. Organizations who participated in this study were: Jazz Arts Group, Columbus, OH; Jazz St. Louis, St. Louis, MO; San Francisco Jazz, San Francisco, CA; Jazz at Lincoln Center; New York, NY; Scullers, Boston, MA; and the Monterey Jazz Festival, Monterey, CA. In addition, a consortium of 13 university presenters, also participated in the study. In total, allowing this first-of-its-kind study to learn from jazz ticket buyers in 19 cities across the country. In the full report, data is reported by study partner, age, and in aggregate.

Respondents like you are asked questions about: 1) types of arts activities they participate in; 2) their feelings about jazz; 3) venues and environments they like to attend; 4) knowledge of artists; and 5) thoughts about how they plan to engage with music in the future.


While the six samples of jazz ticket buyers investigated during this study do not constitute a representative sample of all jazz audiences nationwide, they do represent a diverse cross section of jazz presenters and markets. Keep in mind that this study was limited to jazz buyers (i.e., the people who buy tickets, not the people who come to events with them).



Key Observations:

- Demographically, jazz ticket buyers across the 19 communities are middle-aged, predominantly male, and very well educated. On average, only 17% are under age 45, and 80% are white.
- Younger buyers are significantly different than older buyers, suggesting generational shifts in participation patterns and music preferences.
- Younger buyers are more actively involved in the full range of music activities, especially downloading and organizing music.
- A majority of ticket buyers across all sites (54%) indicated that they would like to play a musical instrument in the future. The figures are highest for younger patrons ages 18-34 (72%).
- A third of respondents across the sites would like to “study music history or music appreciation,” a surprisingly strong indication of interest in the musical form.
- Jazz buyers learn about unfamiliar artists on the radio (presumably both AM/FM radio and Internet radio), and through recommendations from friends or family members (i.e., word of mouth). This corroborates findings from a music listening study (conducted in February 2010) that suggested, “taste is socially transmitted” (i.e., friends introduce friends to new music).
- As evidenced by the proportion of jazz recordings in the respondent’s music collections – a smaller proportion of their overall collection is dedicated to jazz. Younger buyers exhibit categorically more eclectic musical tastes than their older counterparts.
- In considering attending live jazz shows, the artist is the driving decision factor. Cost is a secondary factor amongst younger buyers, especially those with limited jazz experience.
- Approximately 70% to 80% of jazz buyers across the sites aspire to attend more jazz shows than they do now.
- Jazz buyers want to move, suggesting a strong kinetic association. When asked what kind of jazz they like, a third of all buyers indicated they like jazz that...‘makes me want to tap my toes and dance,’ while 31% said they like jazz that...‘makes me think or challenges me in some way.’ Women are very different from men in this respect, with women prioritizing jazz that makes them want to move, and men prioritizing jazz that makes them think. Older buyers 65+ prioritize the sentimental aspects of jazz...‘that takes me back to another time or place.’
- By a wide margin, jazz buyers prefer informal settings for live jazz shows, especially clubs and lounges. Younger buyers have an especially strong affinity for informal settings.
- Preferences for specific jazz artists vary significantly by age and ethnicity. However, preferences for specific artists are clearly influenced by the programming choices made by





the study partners. Overall, results point to the pivotal role that jazz curators (i.e., programming directors) play in evolving preferences and tastes. The more knowledgeable jazz buyers become, the more live jazz they want to hear. Ultimately, the audience is a reflection of what's on stage, which is not to diminish the influence of price, venue and other factors on the audience.

- The research reveals three underlying dimensions of musical preference: 1) Fusion – a combination of youth-leaning cross-genre artists like John Zorn and Jamiroquai; 2) Standards and Masters – artists that in many ways represent the “canon” of jazz masters (e.g., Charlie Parker, Stan Getz); and 3) Pop Crossover – artists that have, over time, grown to appeal to a broad mainstream and pop-based audience (e.g., B.B. King).
- Respondents revealed strong associations with values around new artists and cultural diversity - ‘discovering new artists and new works of art;’ and ‘learning about a broad range of cultures around the world.’ This was especially true for younger buyers.
- Results illustrate the generational shift in technology use amongst younger music consumers. Three quarters of all buyers in the 18-35 cohort use social networking websites, and 68% stream audio from the Internet.

Research Implications for Presenters and Producers of Jazz:

- In order to engage younger buyers, organizations will have to develop a greater focus on multiple strategies that involve both live and digital experiences, and activities that are participatory and observational.
- Given that younger ticket buyers exhibit a tendency to have more eclectic musical tastes, organizations should consider the utility defining themselves around a specific form of music, if their interest is in developing younger and, perhaps, more diverse audiences. Areas to examine include everything from communications strategies to mission.
- Organizations who are serious about engaging a new, less knowledgeable jazz audience will have to find creative ways to address the cost barrier.
- The finding that 70 to 80% of respondents indicated they would like to attend more jazz events than they do currently is hopeful for the field in terms of growing audiences. The next question is how can we activate this interest?
- Presenters and producers of jazz must explore options for making the music available in different types of venues. The research demonstrates that people prefer small, intimate spaces to formal concert halls when choosing to engage with the music. This finding could result in new partnerships within a community.
- Clubs and outdoor settings are appealing “portals” into jazz for younger music lovers. These are settings where people can move around, drink and socialize. Many nonprofit jazz presenters; however, focus their presenting on jazz artists with larger followings, which in turn require larger venues that often do not allow for the experience that many consumers idealize. Presenters and producers of jazz must explore ways to break this cycle. The research suggests that jazz presenters should explore alternative settings in their communities. A venue diversification plan, if possible economically and tactically, may



inspire new partnerships with other local organizations and businesses, and embed jazz organizations more fully in communities.

- Jazz presenters and producers will need to work diligently on creative and engaging ways to package and promote jazz in the future. As a beginning, this will most likely involve the use of fresh language and images in marketing materials.
- Given that interest in music history and appreciation (i.e., learning more about the music) is high, jazz producers and presenters should consider developing educational “add-ons” to a concert, such as projecting a video biography of an artist in the lobby or directly before the show, or encouraging musicians to talk more from the stage about musical styles and the specific pieces they play.
- Jazz producers and presenters must concern themselves with facilitating digital listening experiences in order to fully relate to and engage younger audiences.

Finally, survey results point to dramatic differences in the music consumption patterns of older and younger jazz patrons. Presenting live concerts is not sufficient as a lone strategy for rebuilding the jazz audience. Jazz presenters must see themselves as players in a larger ecology of rapidly shifting musical tastes in which aesthetic development is the primary outcome, not just buying a ticket.

For more information, and to join the conversation, visit: www.jazzartsgroup.org/jai

