



LEWISCLARKBOONE
MARKET INTELLIGENCE

Strings Readership Study

Conducted by
LewisClarkBoone Market Intelligence

May 2008

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 Questionnaire A-1

This report was prepared for *Strings* by Lewis Copulsky, Jennifer Franklin, and Stefanie McNabb. All material © 2008 by Strings Letter Publishing.

Highlights

In the Spring of 2008, surveys were mailed to a sample of *Strings* readers. The purpose of this survey was to gather information on readership of the magazine, purchasing involvement and plans, and demographic data, including age, gender, and education.

- Respondents are most likely to be an adult amateur instrumental musician, instrumental music teacher (full or part-time), and/or a professional instrumental musician (full or part-time).
- Respondents most commonly listen to, play, and perform classical music. One-half of respondents play in a chamber ensemble and almost as many play in a symphony orchestra. A majority of respondents have performed music for others in the past year and expect to do this in the next year.
- More than one-half of respondents have participated in summer music camps, music workshops, and/or continuing education classes in the past as a student, teacher or both, and almost as many may participate in these in the future.
- More than three-quarters of respondents own and/or play a violin and one-third teach violin. Overall, two-fifths of respondents teach or conduct students. More than one-half of respondents cite the violin as their primary instrument, having played it for an average of 29 years.
- Violin owners report having an average of three instruments with an average value of approximately \$15,500 each. They also own an average of four violin bows with an average value of approximately \$2,500 each.
- The music product respondents were most likely to have spent money on during the past year, as well as expect to spend over the next, was strings, followed by recorded music/music downloads, rosin instrument care products, and/or printed music/sheet music downloads.
- More than one-third of respondents spent money on bow rehair and/or instrument repair in the past year. Respondents are most likely to have purchased music products from a stringed instrument specialist dealer who sells only stringed instruments. When shopping for musical instruments or music-related products, respondents tend to consult a musician friend first, followed closely by reviews/articles in *Strings* magazine.
- On average, respondents spend approximately two hours reading a typical issue of *Strings*, and they share their issues with a combination of other household members, musical colleagues, students, and/or others.

Highlights

(continued)

- One-half of respondents have taken one or more actions regarding *Strings* magazine. They are most likely to have referred a student to an article in *Strings* and/or loaned their copy of *Strings* to a student. A majority of respondents save back issues of *Strings* magazine.
- More than one-half of respondents have visited an advertiser's website as a result of seeing an advertisement in *Strings*, while more than one-third made a purchase, and/or contacted an advertiser for more information. Two-thirds of respondents have purchased a product or service from a company or individual who advertises in *Strings*.
- Approximately one-half or more of respondents browse the listings in each of the three special directories *Strings* magazine publishes throughout the year.
- Two-fifths of respondents have visited the *Strings* website. While on the website, they were most likely to have read an article online.
- Two-fifths of respondents have a Bachelor's degree or higher in a music-related field. On average, respondents report a total annual household income of approximately \$101,800. A majority of respondents live in a home they own. The average age of respondents is 51.

Methodology

This survey was conducted by LewisClarkBoone Market Intelligence, an independent research organization. The questionnaire was mailed first-class on March 25, 2008, to a total of 750 *Strings* readers, accompanied by a \$1 incentive and a business-reply envelope. A follow-up mailing was sent on April 24, 2008 to all non-respondents.

A total of 372 usable returns were received by the May 23, 2008 cut-off date. In addition, three blank, unusable or late questionnaires were received.

The final usable response rate for this survey was 50%.

	Summary:	
Surveys mailed		750
Usable returns		372
Late/unusable returns		3
TOTAL RETURNS		375
 RESPONSE RATE (usable returns)		 50 %

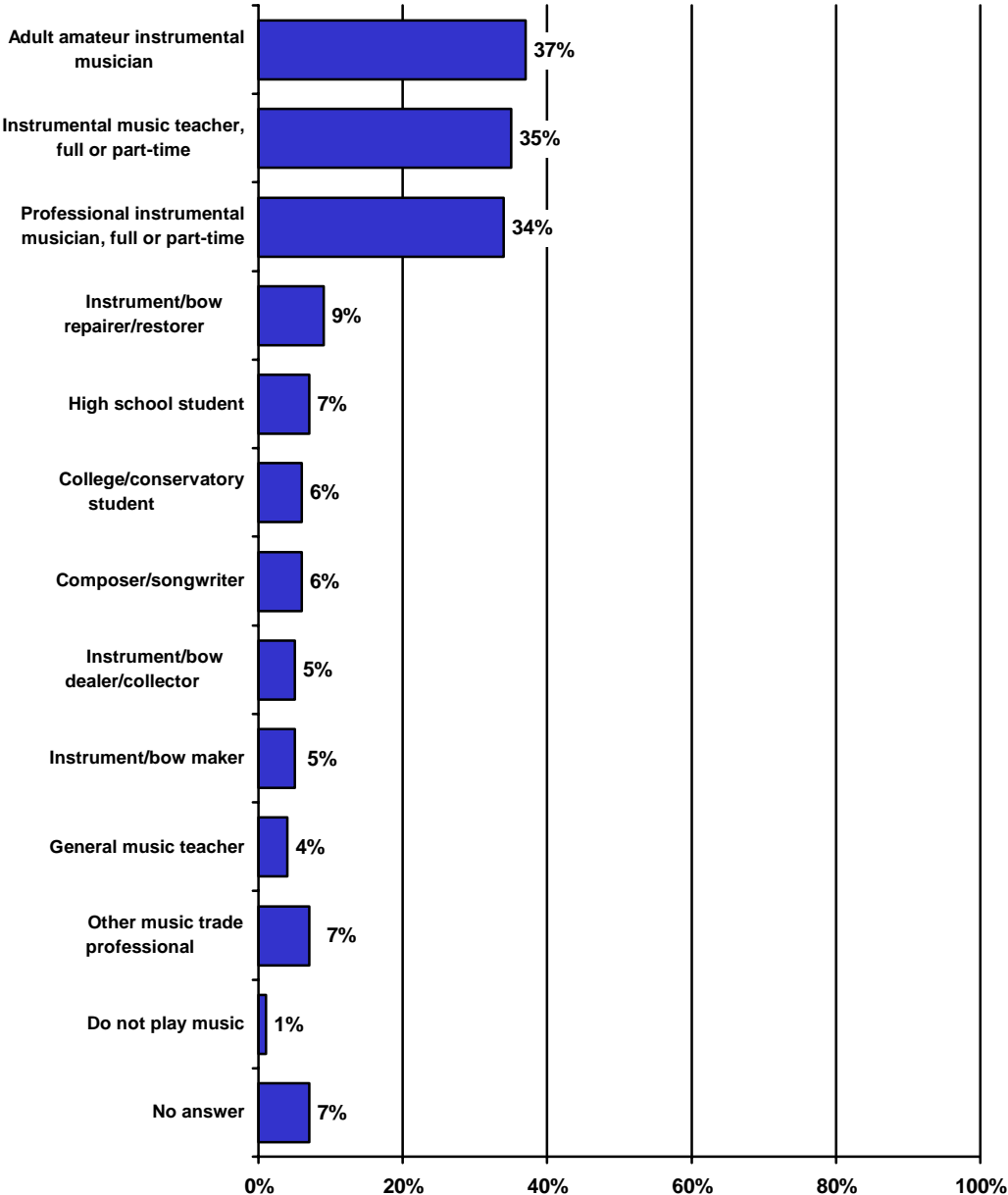
A copy of the questionnaire can be found at the end of this report.

Summary of Findings

YOUR INVOLVEMENT WITH MUSIC

- Involvement with Music

Respondents are involved in music in a variety of ways. The largest categories consist of adult amateur instrumental musicians (37%), instrumental music teachers (35%), and professional instrumental musicians (34%).

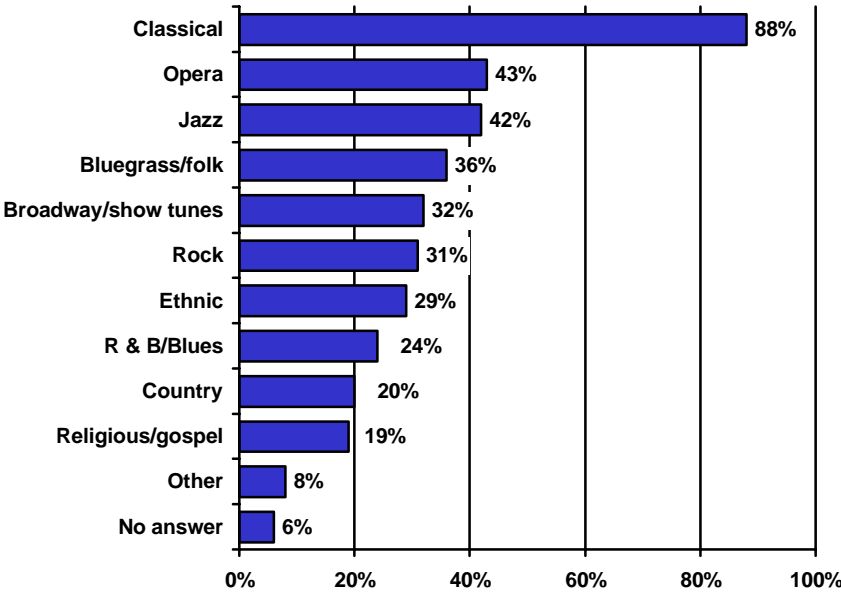


YOUR INVOLVEMENT WITH MUSIC

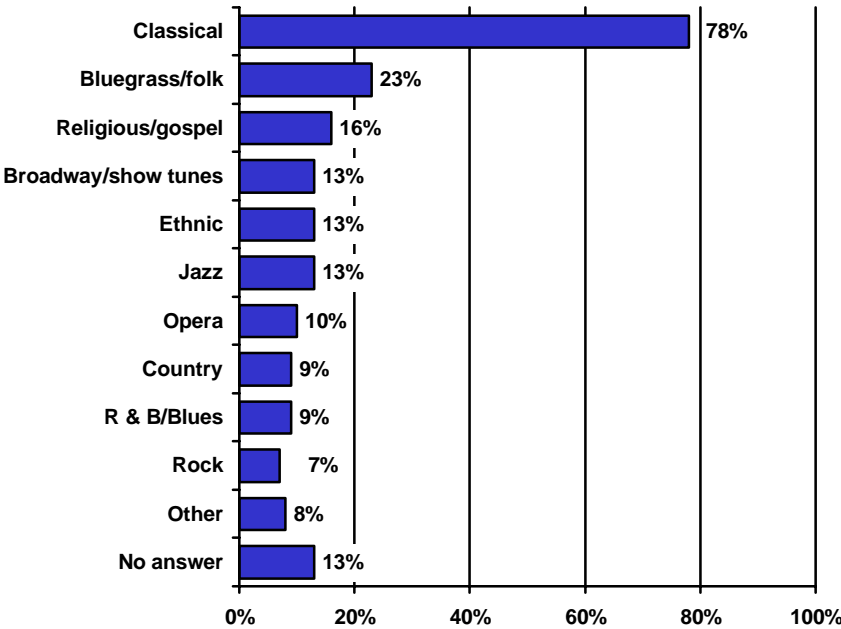
- Types of Music Listened to, Played, Performed

Respondents enjoy listening to, playing for themselves and performing for others a variety of types of music, as shown in the following charts:

Listen to



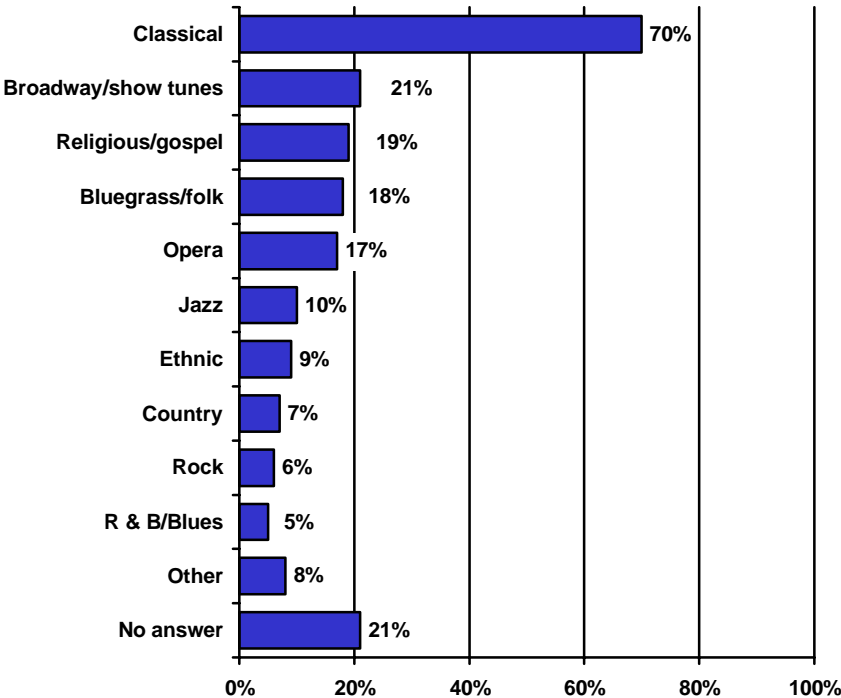
Play



YOUR INVOLVEMENT WITH MUSIC

- Types of Music Listened to, Played, Performed (continued)

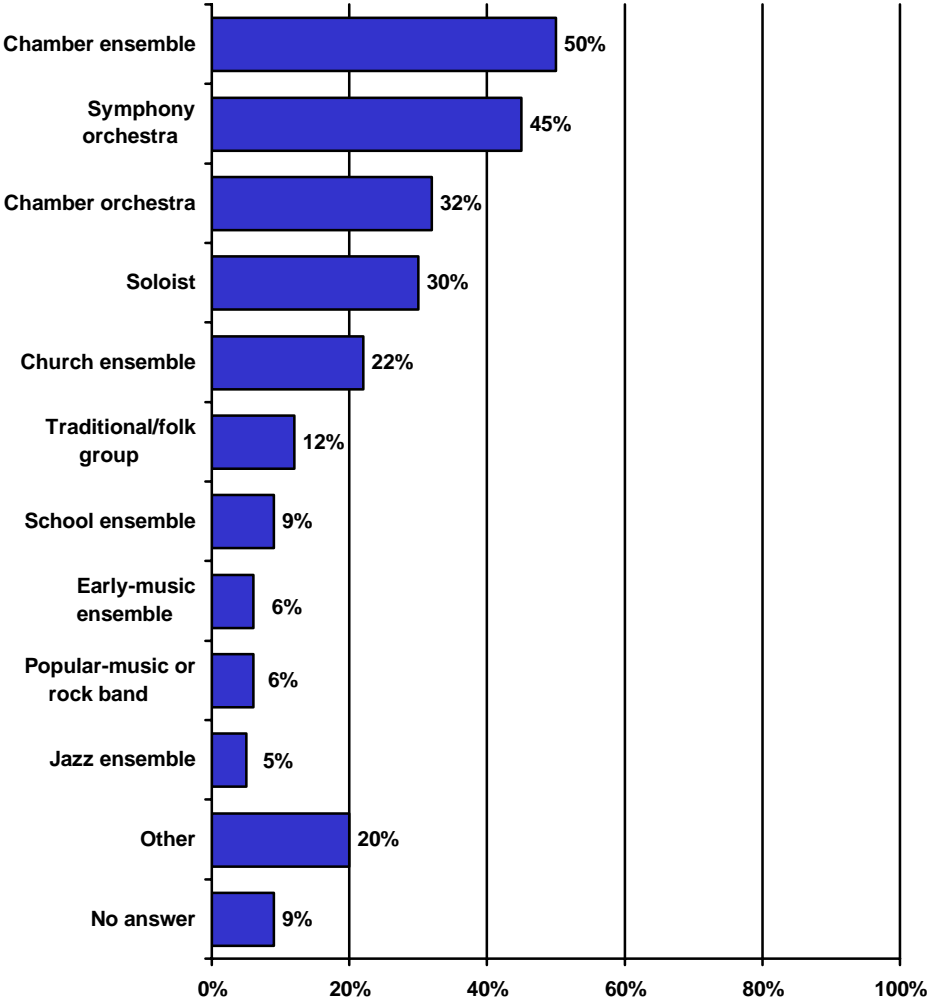
Perform for Others



YOUR INVOLVEMENT WITH MUSIC

- Settings Where Instruments are Played

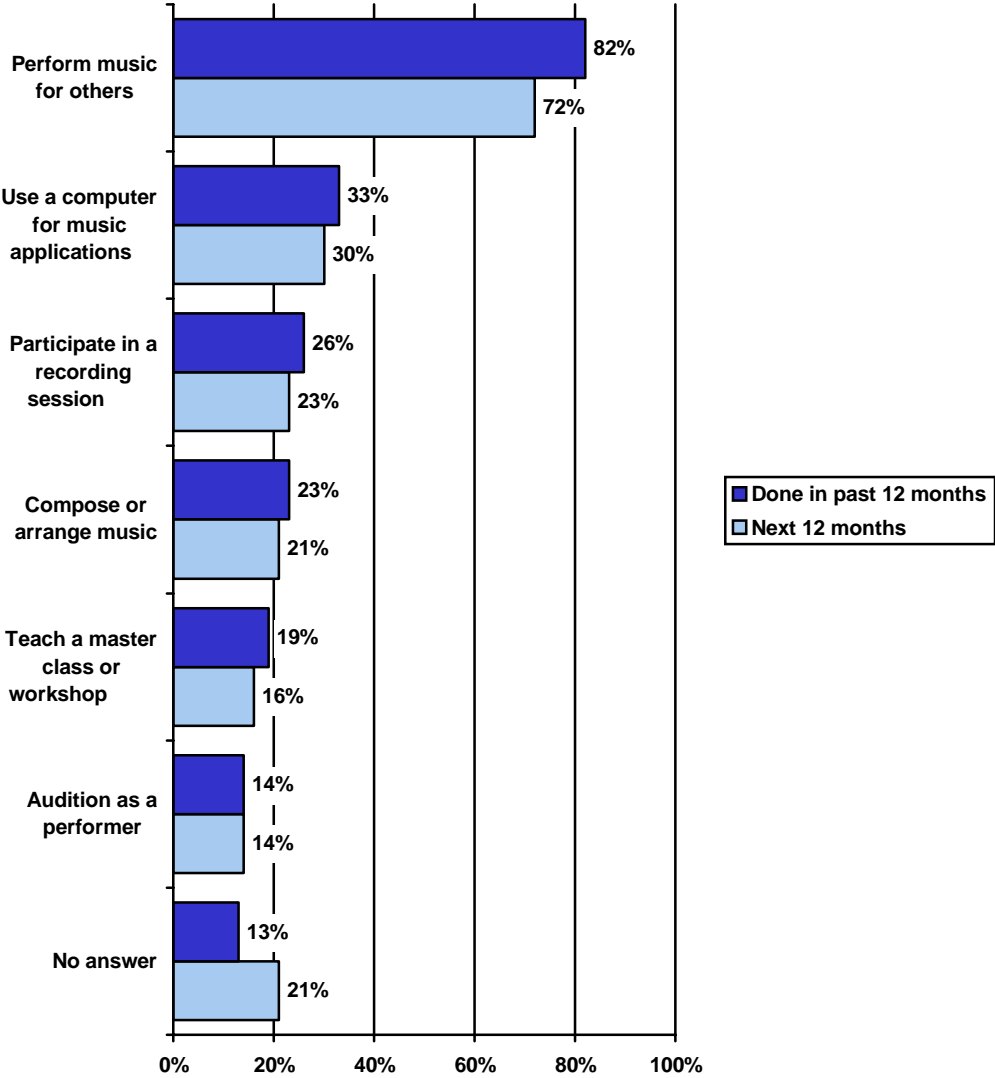
One-half of respondents (50%) play their stringed instrument in a chamber ensemble, while 45% play them in a symphony orchestra.



YOUR INVOLVEMENT WITH MUSIC

- Music Activities

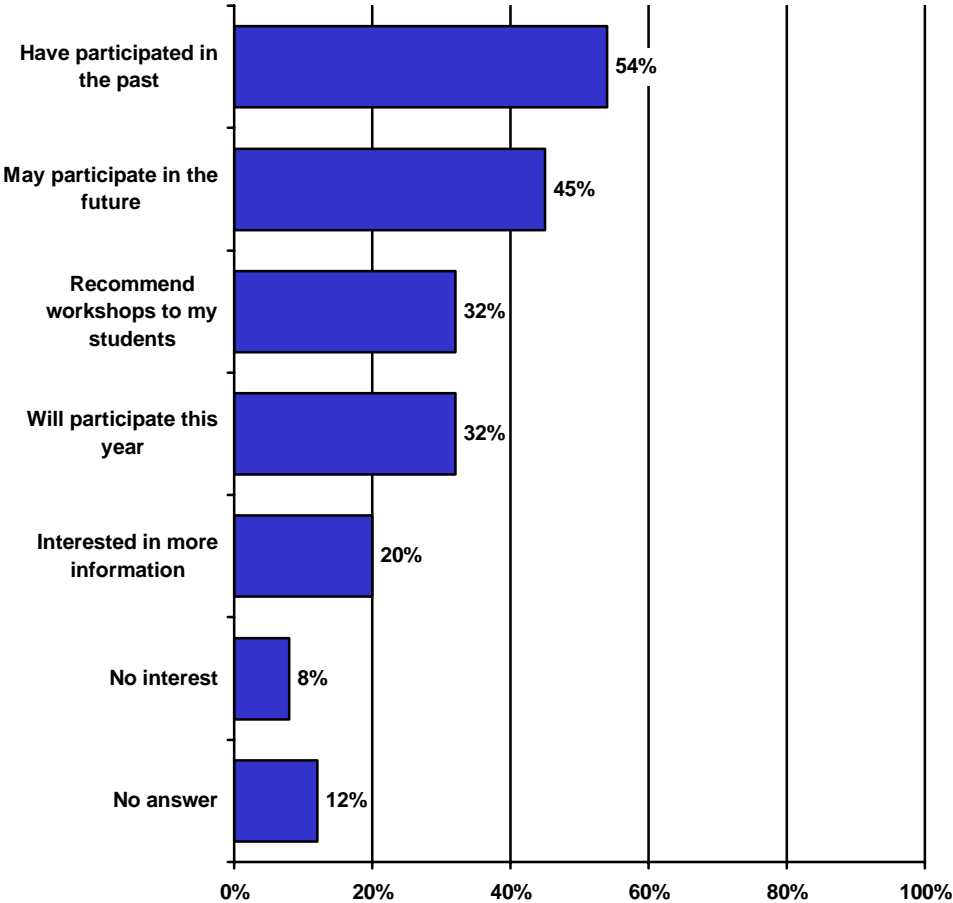
Respondents have engaged in a variety of music-related activities in the past twelve months, and they have plans to continue to participate in these activities over the next twelve months.



YOUR INVOLVEMENT WITH MUSIC

- Interest in Camps, Workshops, Continuing Education Classes

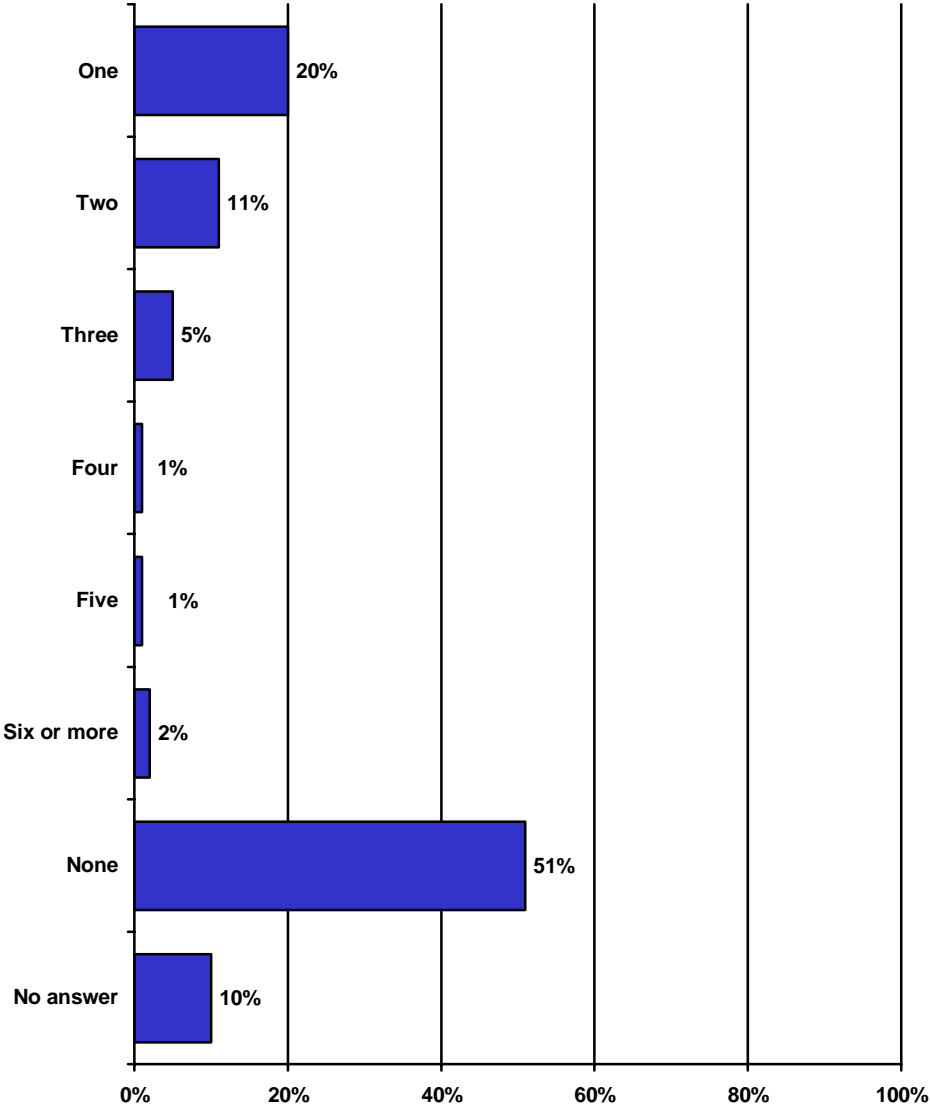
Respondents exhibit various levels of interest and participation, as a student or teacher or both, in summer music camps, music workshops, and continuing education classes, as shown in the following chart:



YOUR INVOLVEMENT WITH MUSIC

- **Number of People in Household who Play Stringed Instrument**

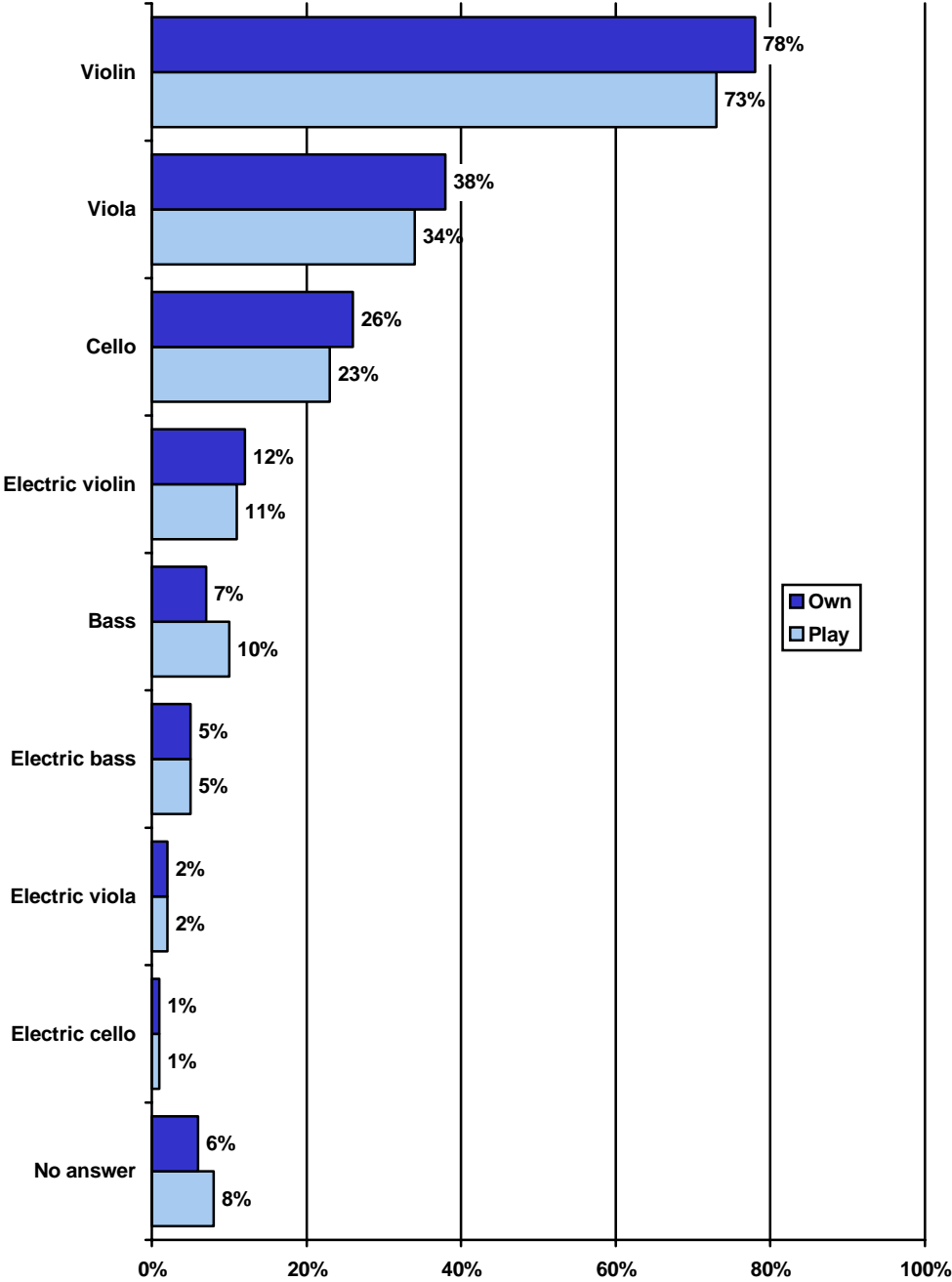
Approximately two-fifths of respondents (39%) report that at least one other person in their household plays a stringed instrument.



YOUR INVOLVEMENT WITH MUSIC

- Musical Instruments Owned and Played

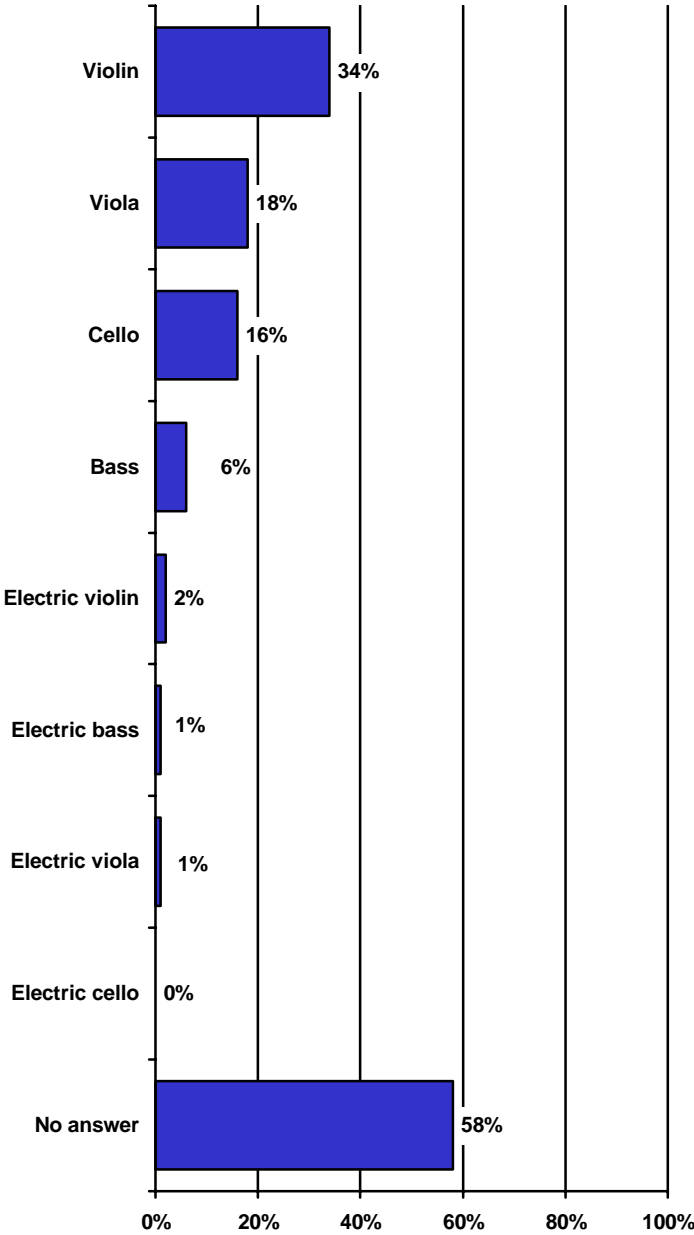
More than three-quarters of respondents (78%) own a violin, while more than one-third (38%) own a viola and one-quarter (26%) own a cello. Respondents, in general, are slightly less likely to play an instrument than they are to own one.



YOUR INVOLVEMENT WITH MUSIC

- **Musical Instruments Taught**

More than two-fifths of respondents (42%) teach a musical instrument. Of these, more than three-quarters teach the violin.



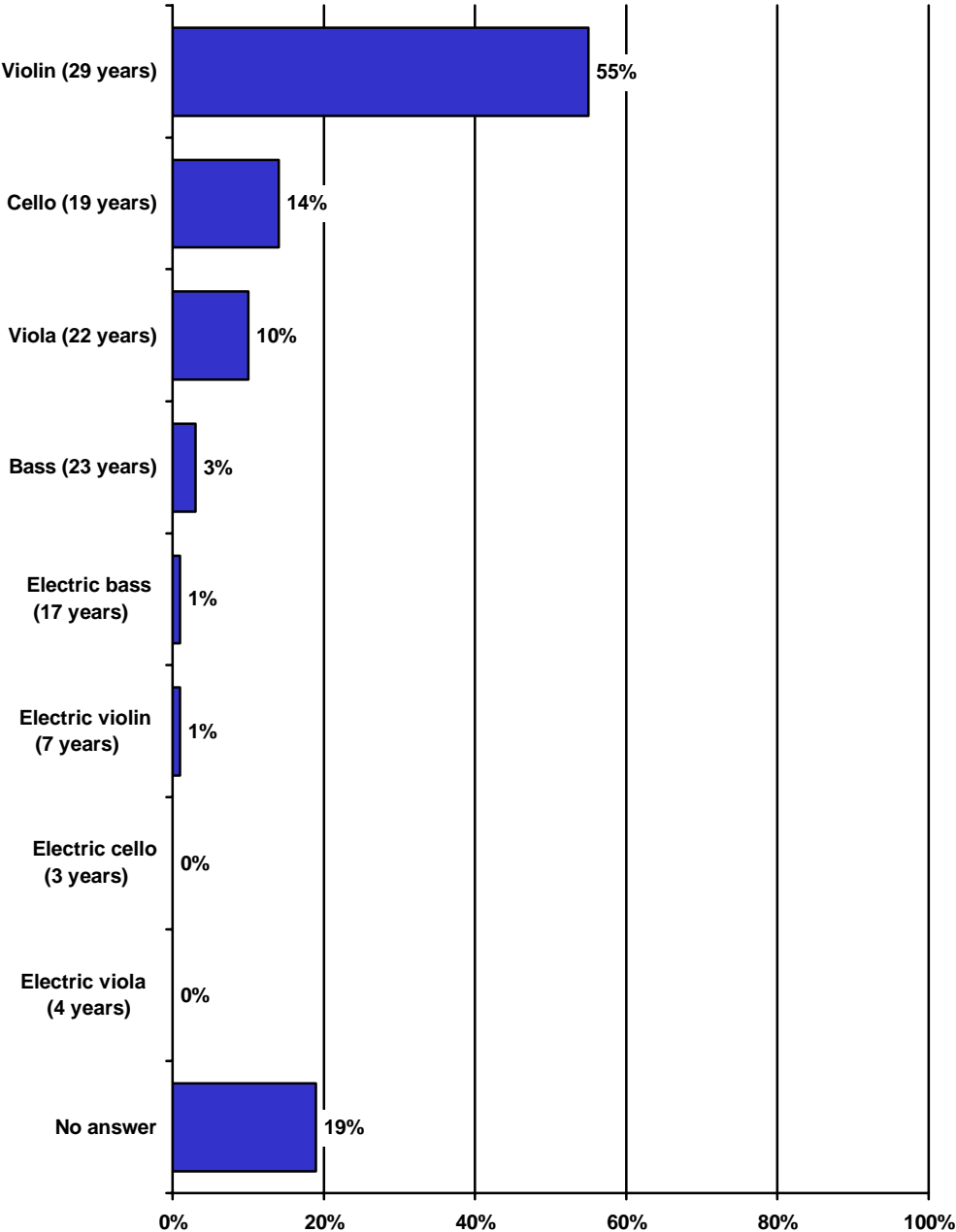
- **Plans for Musical Instruments**

Close to one-fifth of respondents (16%) are considering purchasing a stringed instrument.

YOUR INVOLVEMENT WITH MUSIC

- Primary Instrument and Average Number of Years Playing

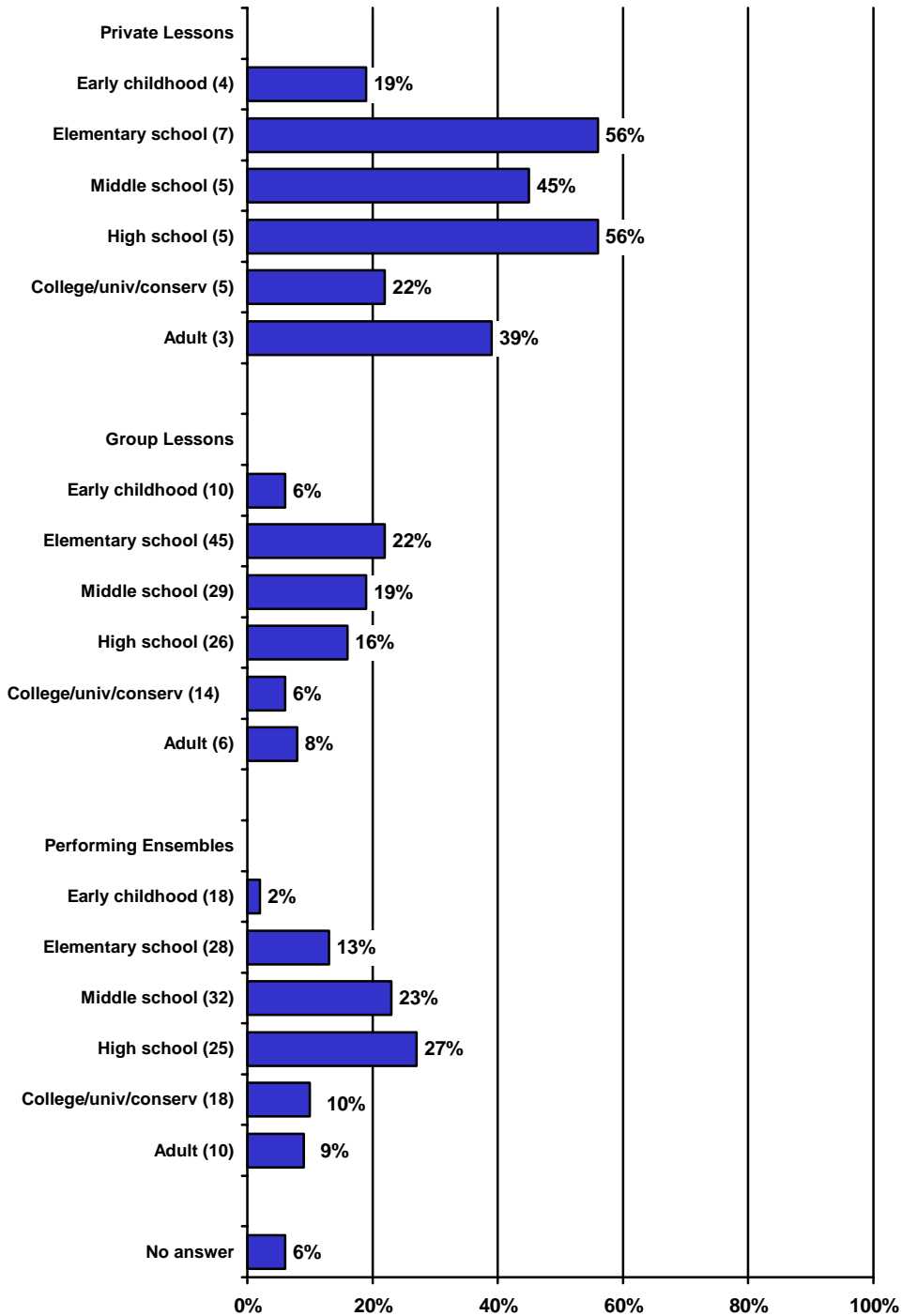
More than one-half of respondents (55%) cite the violin as their primary instrument. The number in parentheses is the average number of years respondents have been playing each instrument.



YOUR INVOLVEMENT WITH MUSIC

- Teaching or Conducting Students

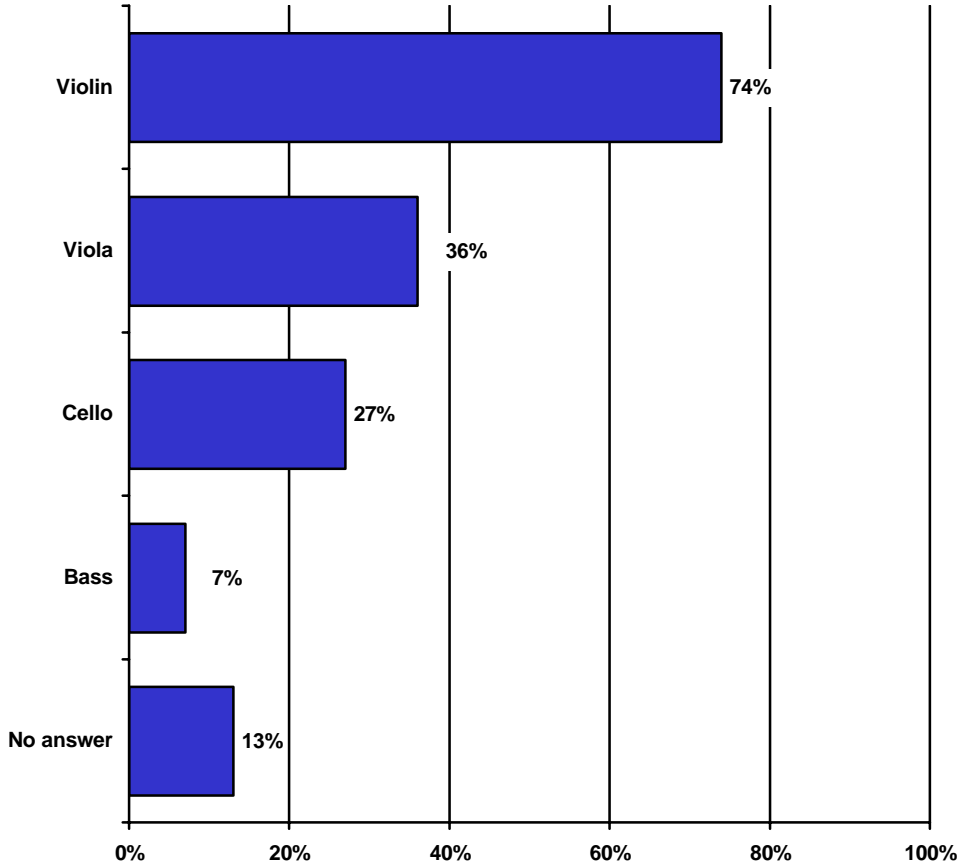
Approximately two-fifths of respondents (39%) teach or conduct students of stringed instruments. The following chart shows the percentage of respondents who teach or conduct one or more of each kind of student. The number in parentheses is the average number of students taught in the category.



YOUR INVOLVEMENT WITH MUSIC

• **Number and Value of Instruments and Bows Owned**

Respondents own a variety of stringed instruments. The following chart shows the percentage of respondents who own one or more of each type of instrument:



The following table shows the average number of instruments as well as the average number of bows each respondent owns, and the average value of each instrument and type of bow:

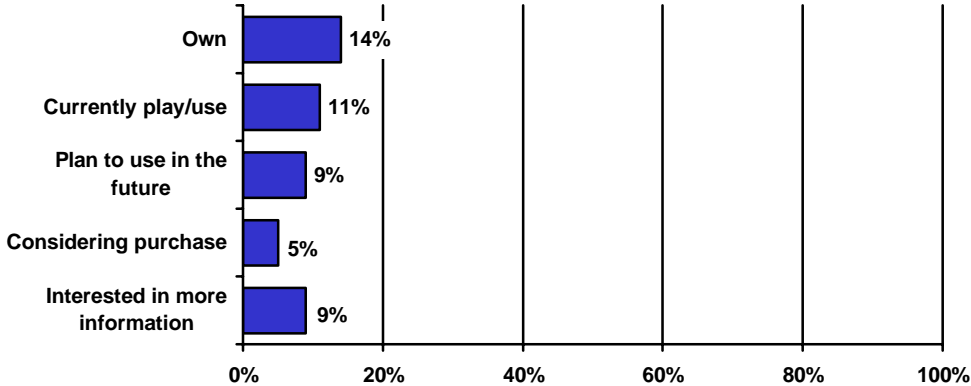
<u>INSTRUMENT</u>	<u>AVERAGE # OWNED</u>	<u>AVERAGE VALUE</u>	<u># BOWS OWNED</u>	<u>AVERAGE VALUE OF BOWS</u>
Violin	3	\$15,470	4	\$2,533
Viola	2	\$7,326	2	\$1,350
Cello	2	\$20,102	3	\$2,036
Bass	2	\$4,928	2	\$687

YOUR INVOLVEMENT WITH MUSIC

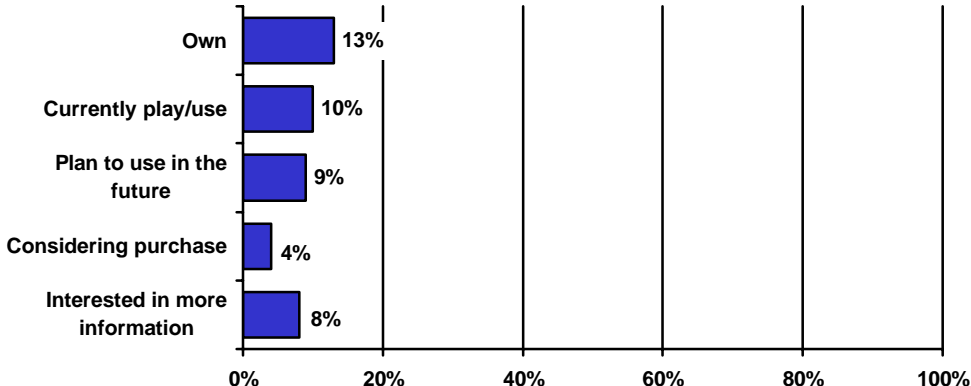
- Primary Instrument Accessories

The following charts show respondent involvement with musical instrument accessories.

Pick-up for Acoustic Instrument



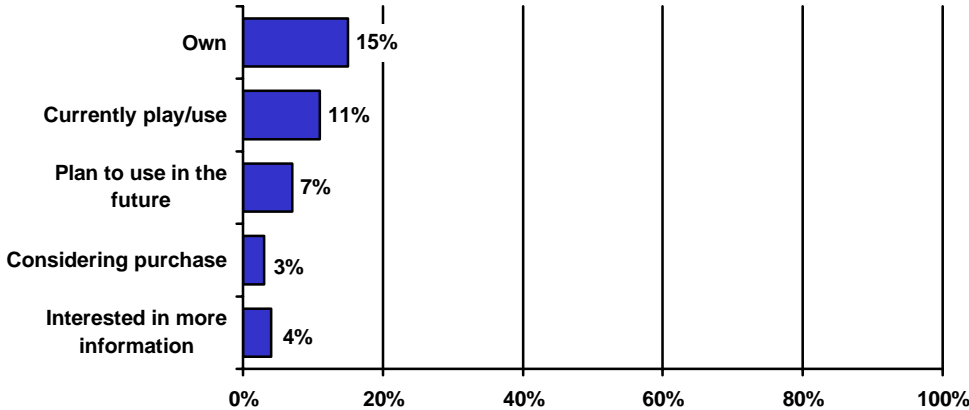
Amplifier for Acoustic Instrument



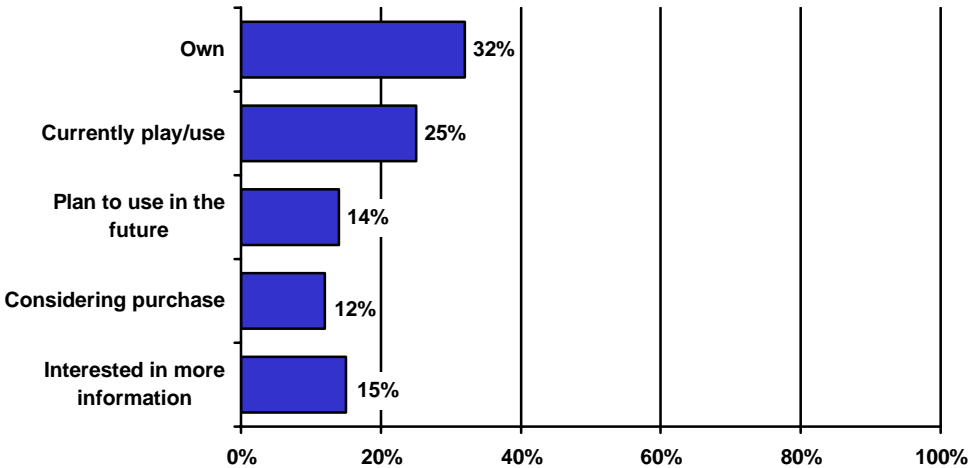
YOUR INVOLVEMENT WITH MUSIC

- Primary Instrument Accessories (continued)

Amplifier for Electric Instrument



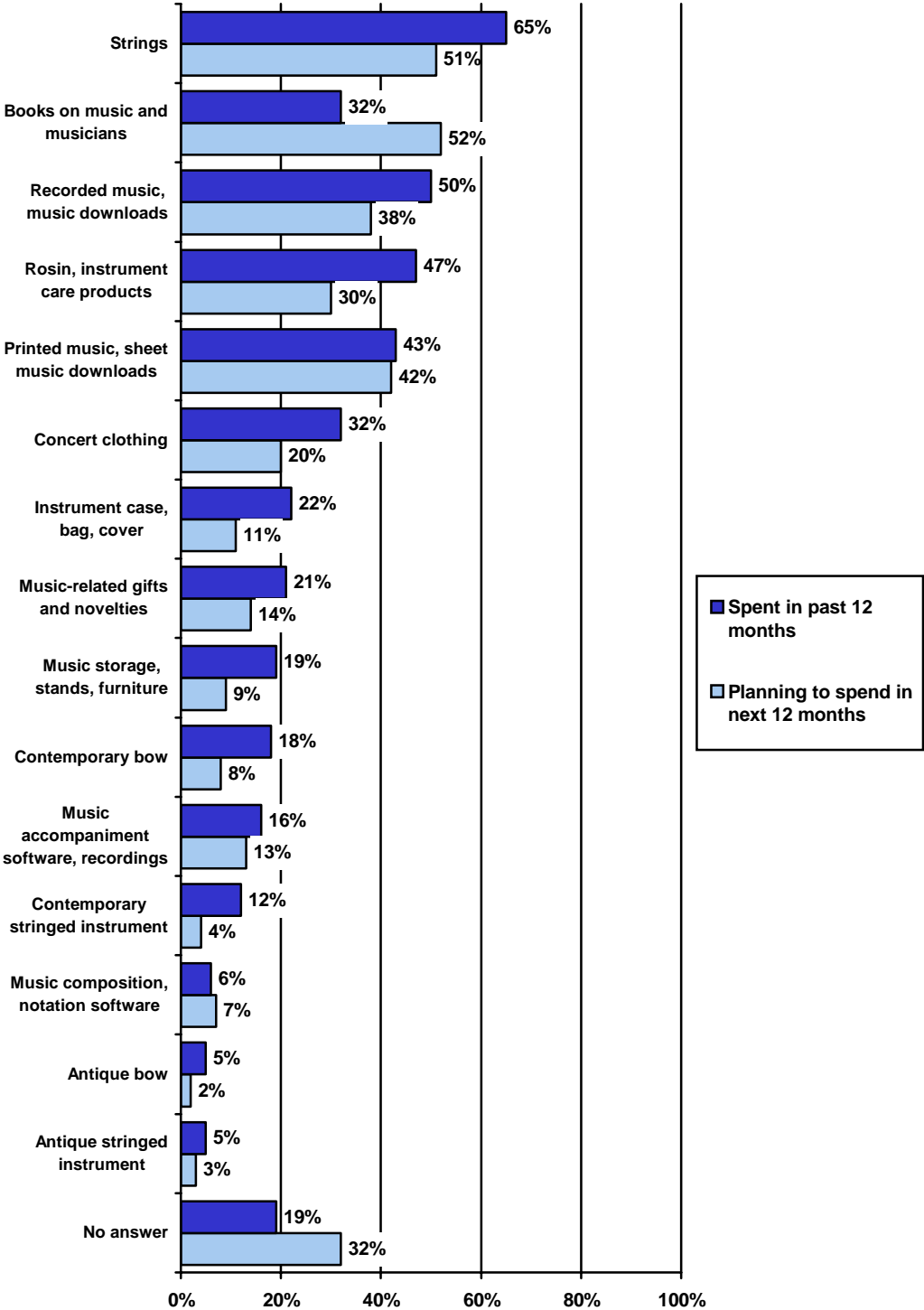
Carbon Fiber/Composite Bow



YOUR INVOLVEMENT WITH MUSIC

• Spending on Music Products

Respondents spent money on a variety of music products in the past twelve months, and they plan to continue doing so in the next twelve months.



YOUR INVOLVEMENT WITH MUSIC

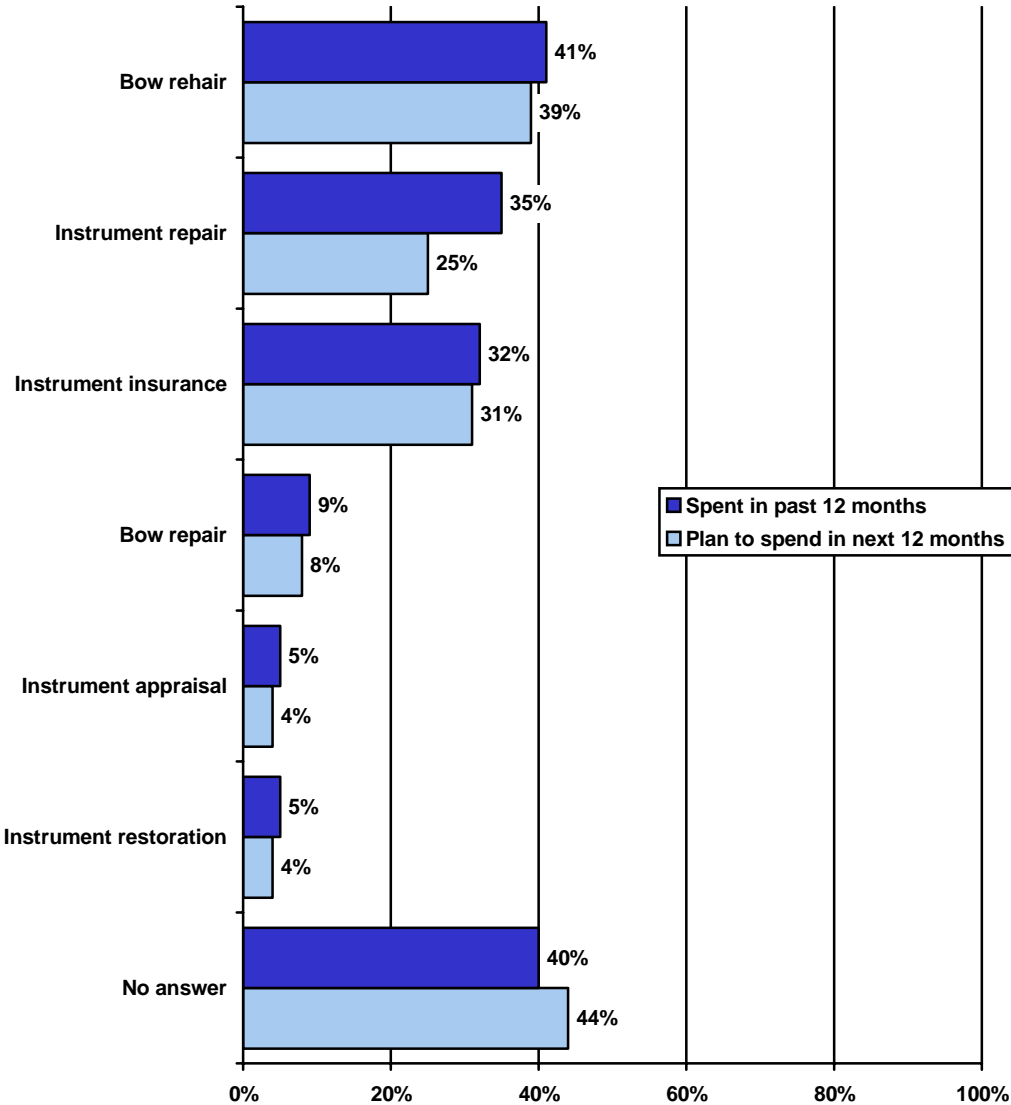
- Spending on Music Products (continued)

<u>INSTRUMENT</u>	<u>AVERAGE SPENT IN PAST 12 MONTHS</u>	<u>AVERAGE PLANNING TO SPEND IN NEXT 12 MONTHS</u>
Contemporary stringed instrument	\$8,321	\$3,767
Antique stringed instrument	\$7,750	\$15,796
Antique bow	\$3,417	\$3,154
Contemporary bow	\$1,024	\$2,047
Instrument case, bag, cover	\$395	\$457
Concert clothing	\$274	\$239
Printed music, sheet music downloads	\$216	\$188
Music accompaniment software	\$213	\$134
Books on music and musicians	\$206	\$186
Recorded music, music downloads	\$194	\$190
Strings	\$190	\$169
Music comp. notation software	\$167	\$155
Music storage, stands, furniture	\$105	\$119
Music-related gifts and novelties	\$88	\$102
Rosin, instrument care products	\$85	\$124

YOUR INVOLVEMENT WITH MUSIC

- Spending on Music-Related Services

Respondents spent money on a variety of music-related items in the past twelve months, and they plan to continue doing so in the next twelve months.



YOUR INVOLVEMENT WITH MUSIC

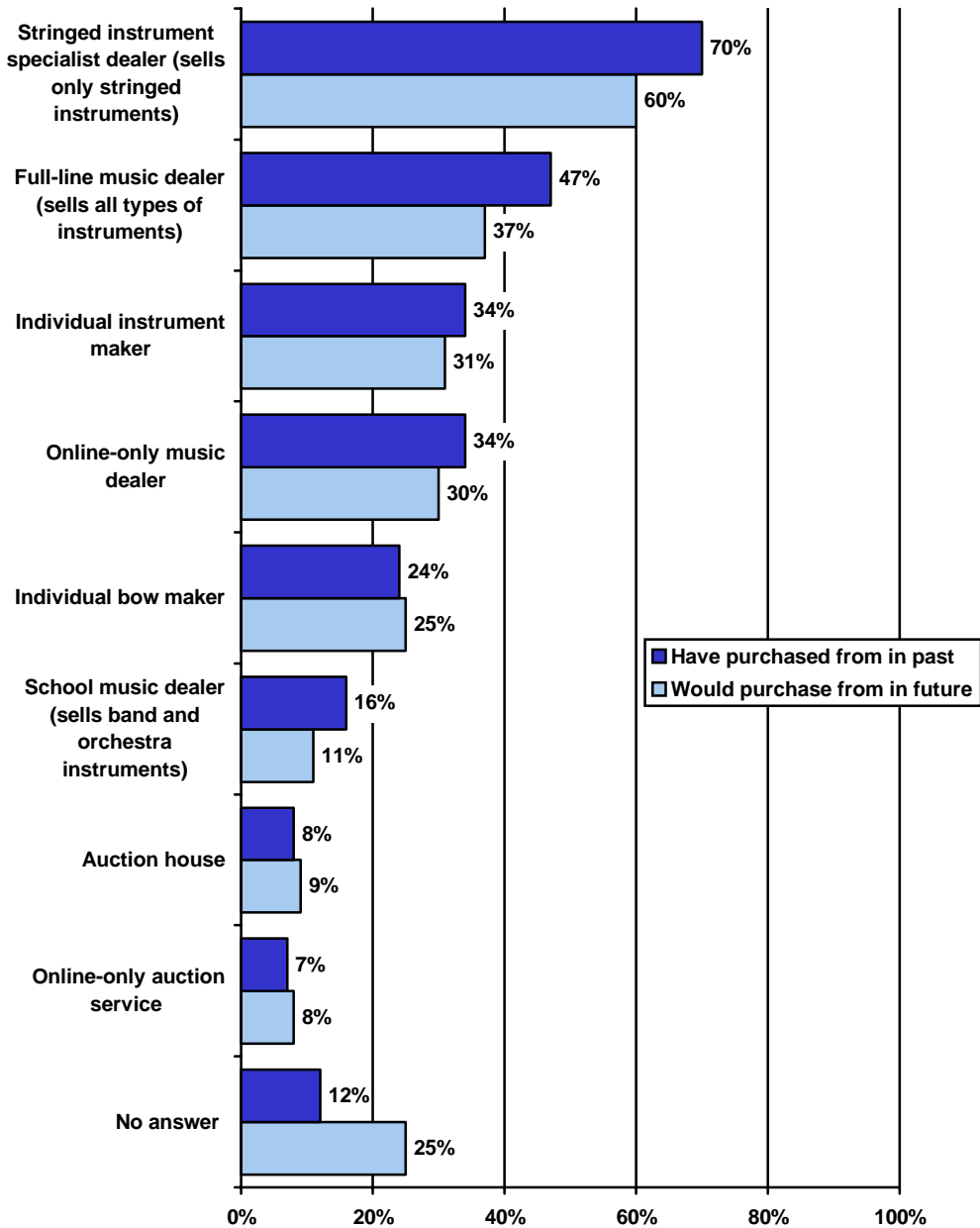
- Spending on Music-Related Services (continued)

<u>SERVICE</u>	<u>AVERAGE SPENT IN PAST 12 MONTHS</u>	<u>AVERAGE PLANNING TO SPEND IN NEXT 12 MONTHS</u>
Instrument insurance	\$879	\$853
Instrument appraisal	\$842	\$108
Instrument repair	\$276	\$256
Instrument restoration	\$520	\$856
Bow repair	\$154	\$157
Bow rehair	\$124	\$118

YOUR INVOLVEMENT WITH MUSIC

• Sources for Purchasing Music Products

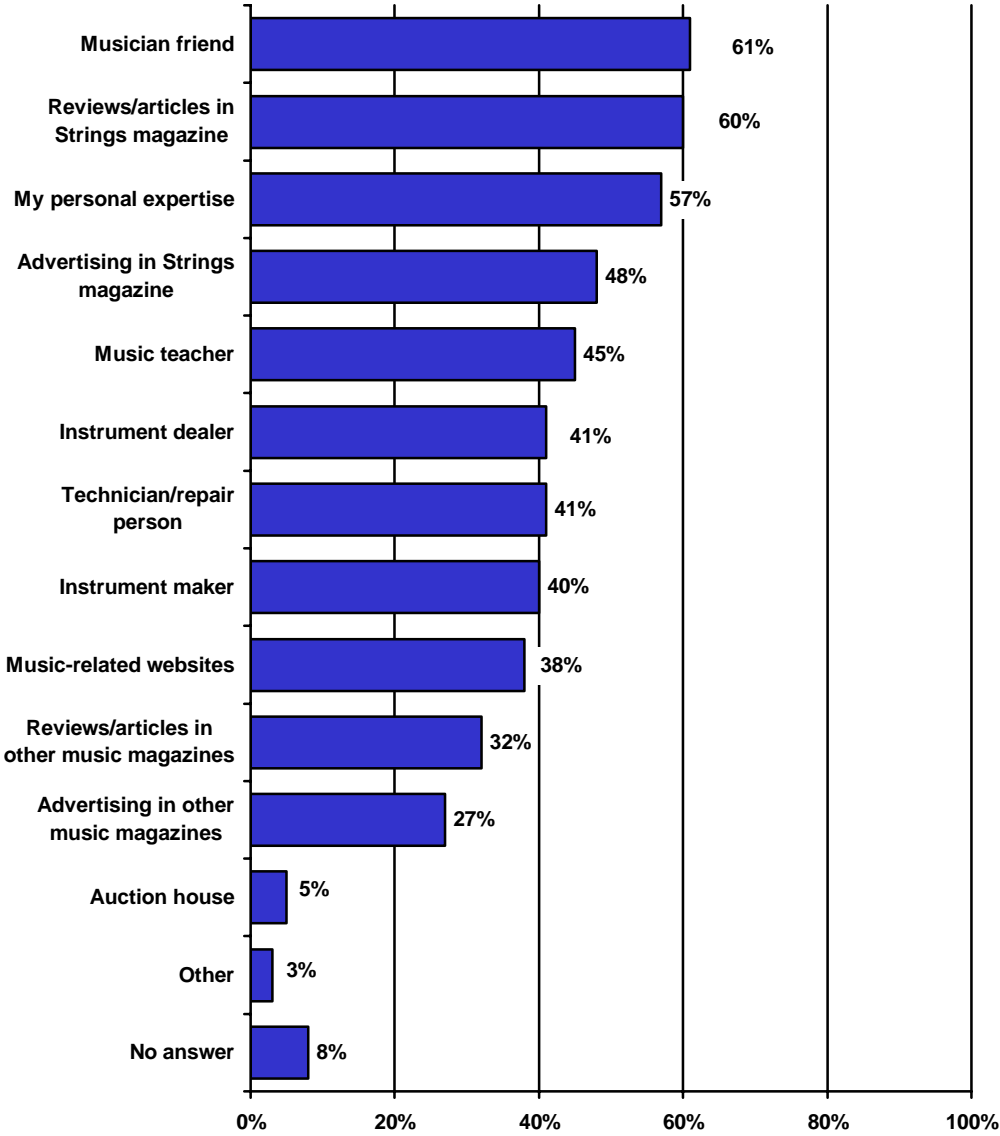
Respondents are most likely to have purchased music products from a stringed instrument specialist dealer, and they plan to continue to do so in the future.



YOUR INVOLVEMENT WITH MUSIC

- Sources for Information on Instruments and Related Products

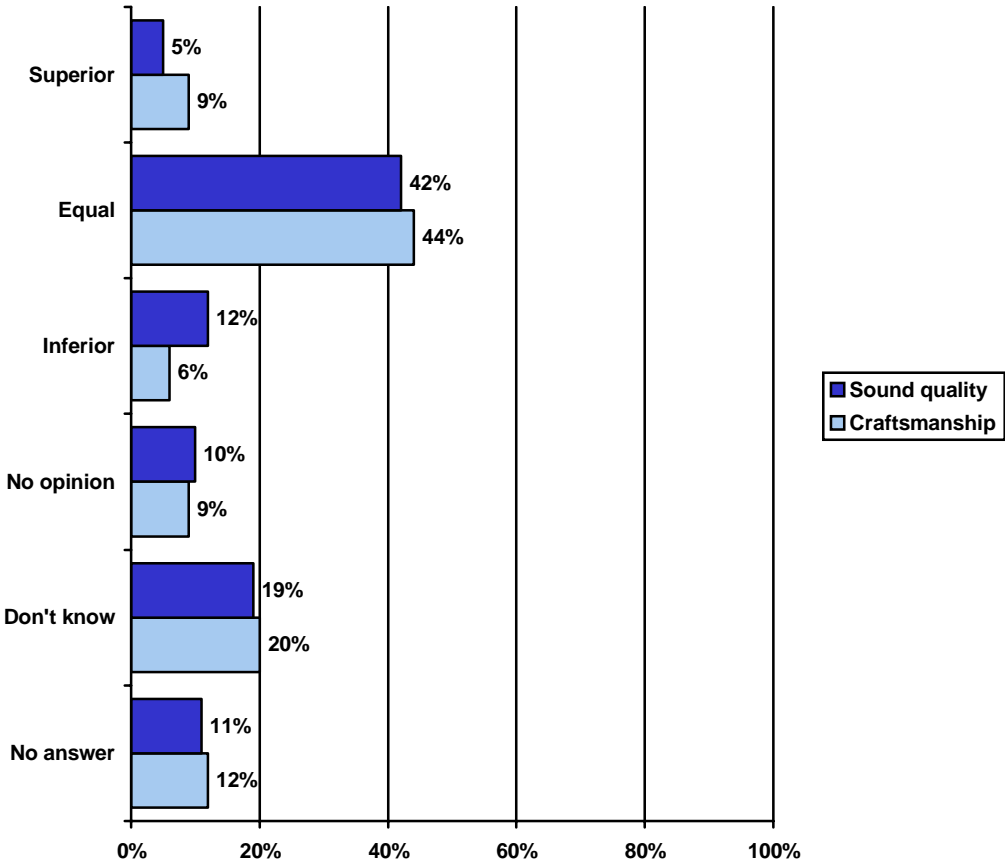
Respondents are most likely to consult a musician friend (61%), reviews/articles in *Strings* magazine (60%), and/or rely on their own personal expertise (57%) when shopping for musical instruments or music-related products.



YOUR INVOLVEMENT WITH MUSIC

- **Quality of Modern Instruments Compared to Best Ever Made**

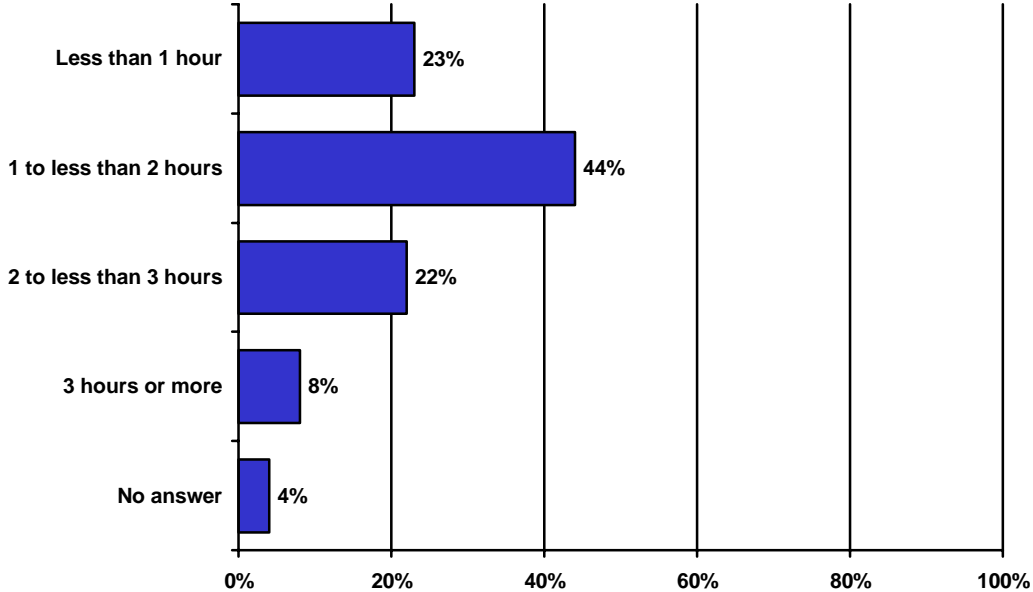
Close to one-half of respondents (47%) feel the sound quality of the best modern instruments and bows is as good as or better than the best ones ever made, and more than one-half (53%) feel the craftsmanship of today’s best modern instruments and bows is as good as or better than the best ones ever made.



ABOUT STRINGS MAGAZINE

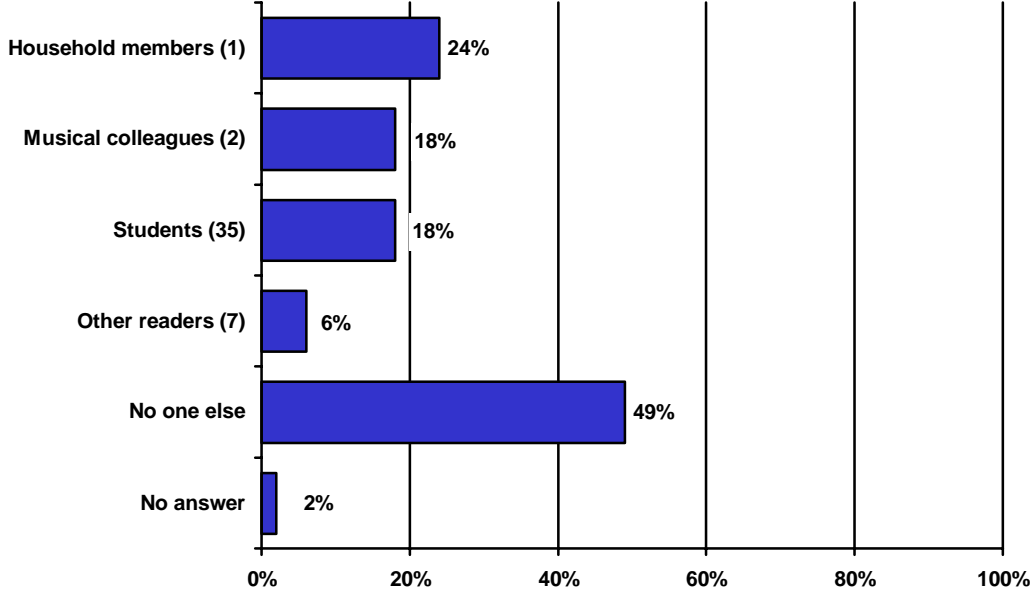
- Time Spent Reading Typical Issue

Approximately three-quarters of respondents (74%) spend one hour or more reading a typical issue of *Strings*.



- Additional Readers

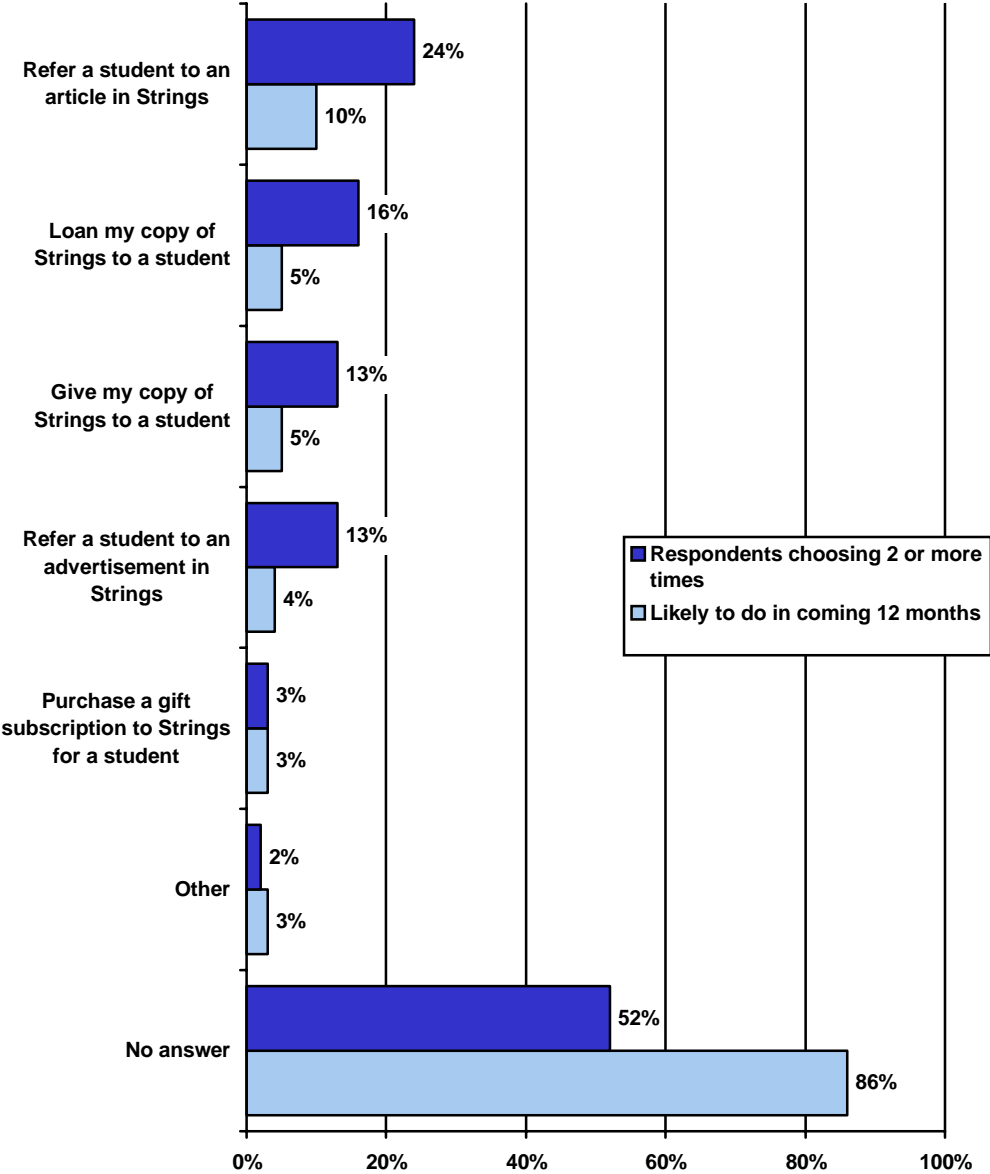
Respondents most commonly (24%) share their issues of *Strings* with household members. The number in parentheses is the average number of each type of reader with whom respondents share their issues of *Strings*.



ABOUT STRINGS MAGAZINE

- Actions Taken Regarding *Strings* Magazine

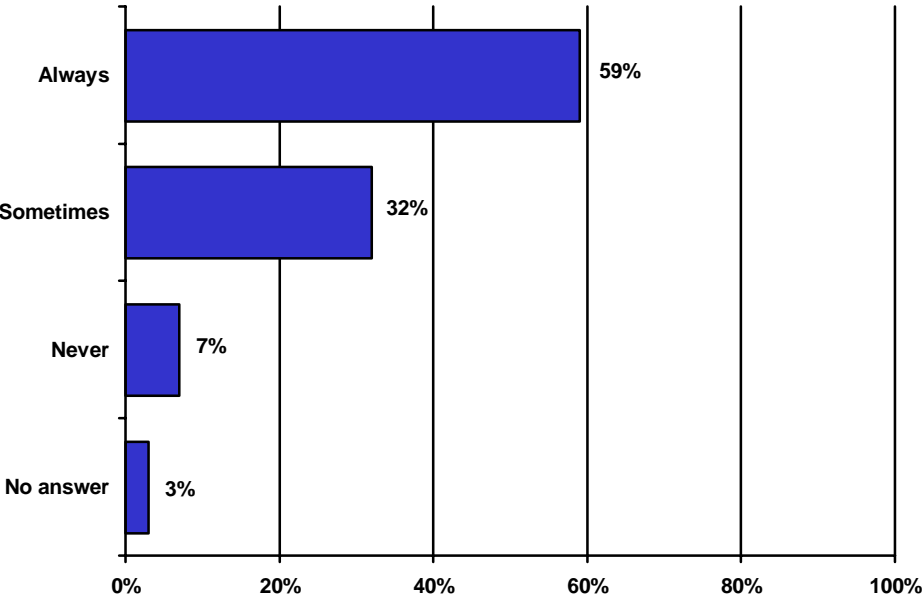
Approximately one-half of respondents (48%) have taken one or more actions regarding *Strings* magazine, the most frequent one being referring a student to an article in *Strings*.



ABOUT STRINGS MAGAZINE

- Saving Back Issues of *Strings*

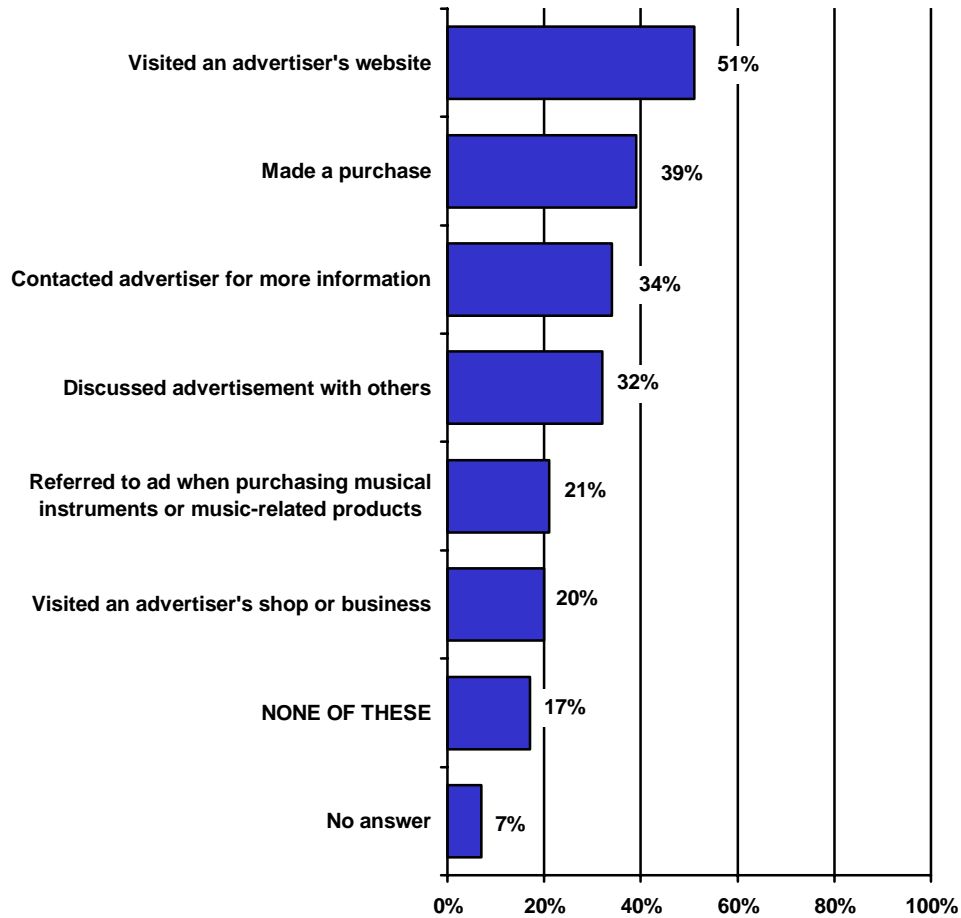
A majority of respondents (91%) save back issues of *Strings* magazine at least sometimes.



ABOUT STRINGS MAGAZINE

- **Actions Taken as Result of Seeing Advertisement in *Strings***

Respondents have taken a variety of actions as a result of seeing an advertisement in *Strings* magazine. More than one-half (51%) have visited an advertiser’s website.

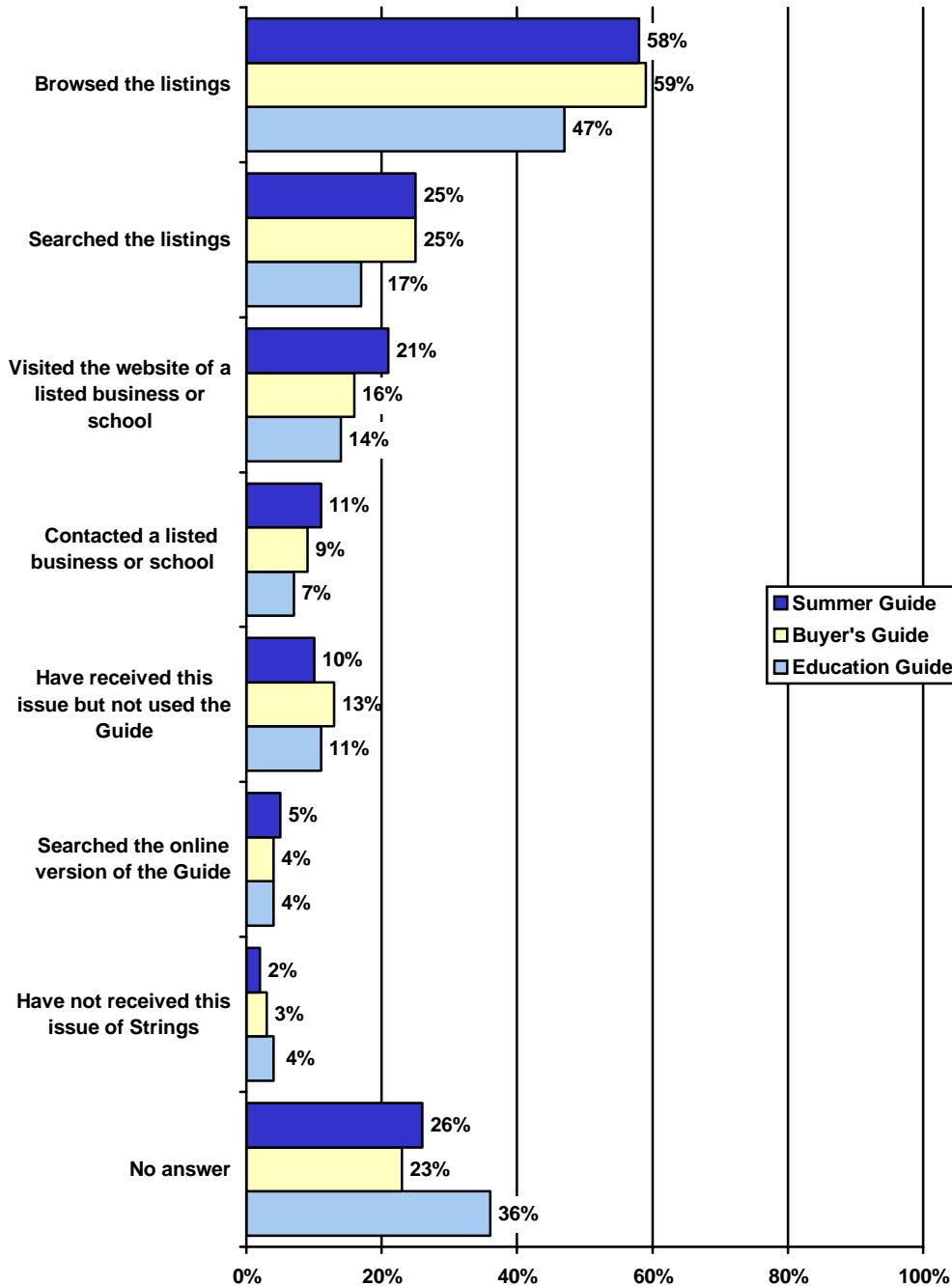


Close to two-thirds of respondents (63%) have purchased a product or service from a company or individual who advertises in *Strings*.

ABOUT STRINGS MAGAZINE

- Use of *Strings*' Special Directories

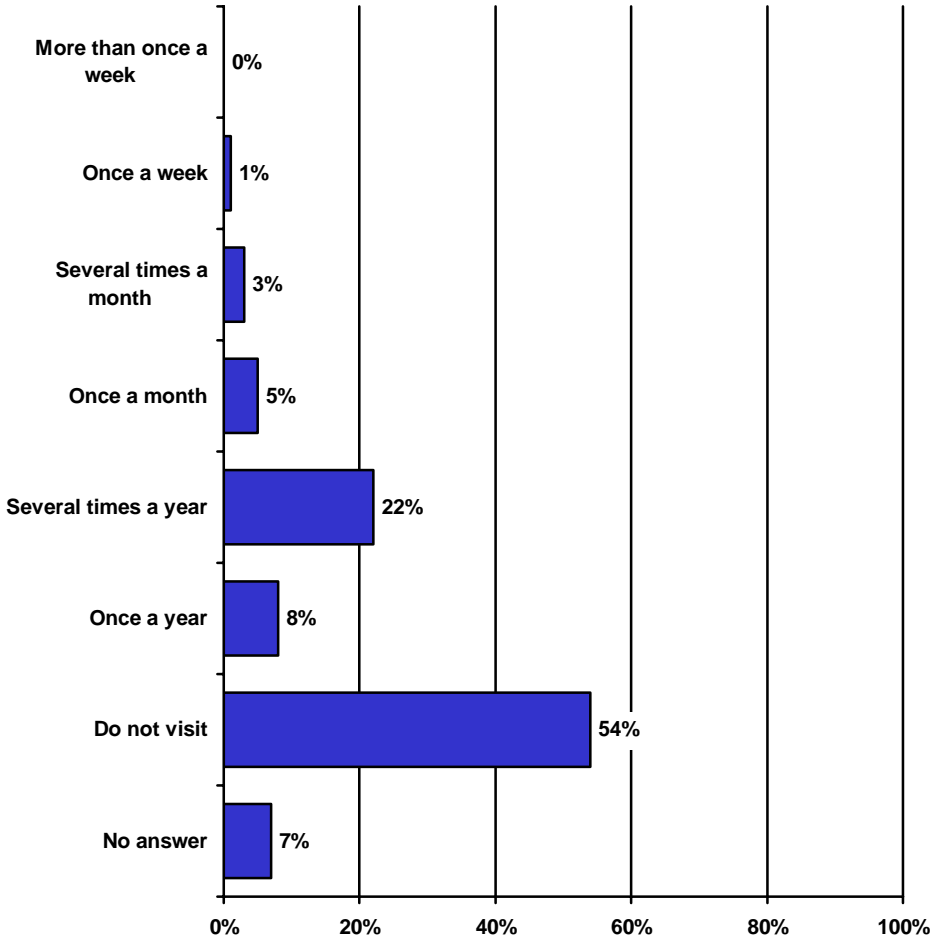
Respondents have taken a variety of actions as a result of reading the three special directories *Strings* magazine publishes throughout the year, the most frequent of which was to browse the listings.



ABOUT STRINGS MAGAZINE

- Frequency of Visiting the *Strings* Website

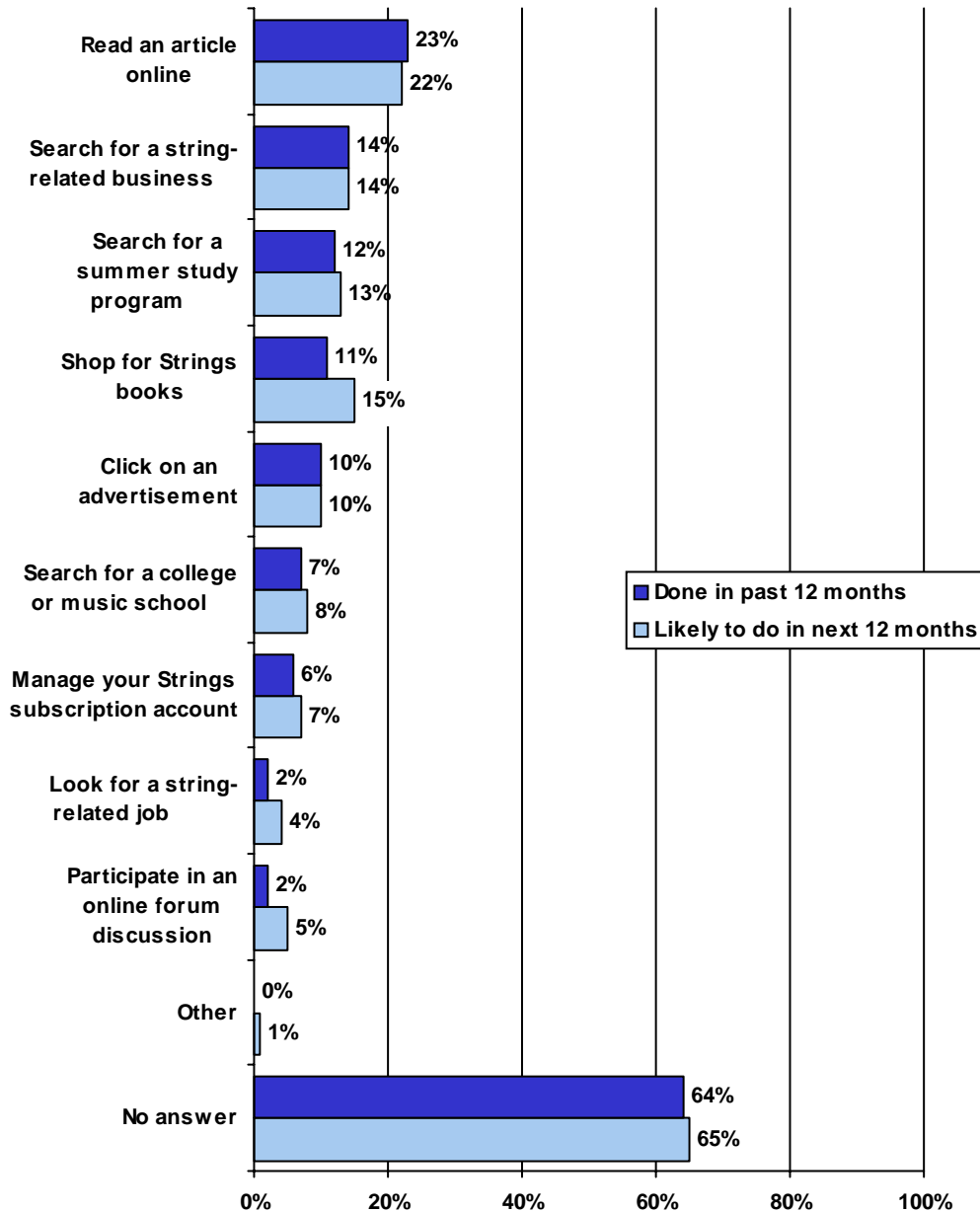
Close to one-third of respondents (31%) visit the *Strings* website, www.stringsmagazine.com (also known as www.allthingsstrings.com) at least several times a year.



ABOUT STRINGS MAGAZINE

• Actions Taken While Visiting *Strings* Website

Respondents were most likely to have read an article online (23%) while visiting www.stringsmagazine.com during the past 12 months.

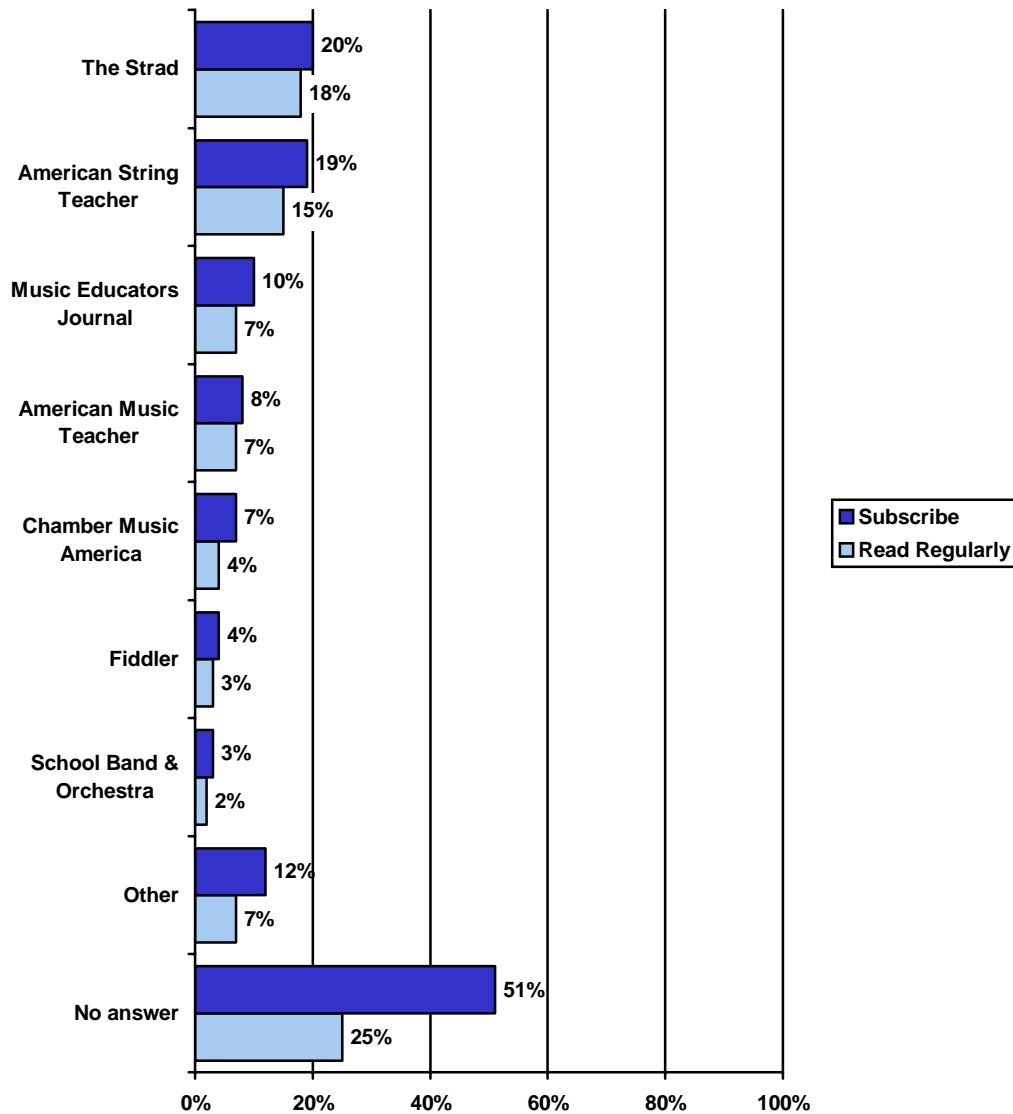


On average, respondents spend approximately six minutes on their visits to www.stringsmagazine.com.

ABOUT STRINGS MAGAZINE

- **Involvement with Other Music Publications**

After *Strings*, the publications most frequently subscribed to and/or read are *The Strad* and *American String Teacher*.



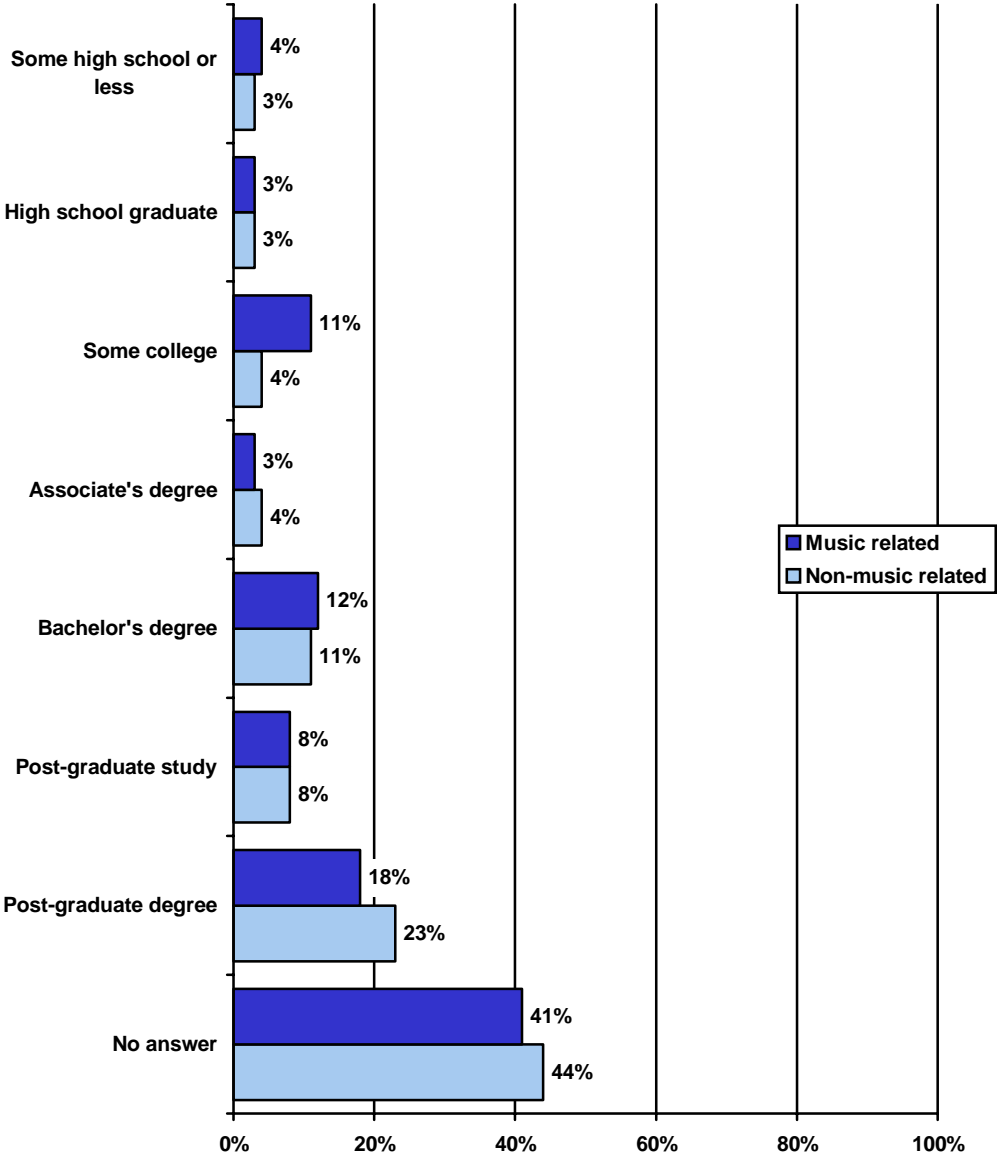
- **Visiting Music-Related Websites**

Respondents were asked to indicate how often they visit specific music-related websites, but none of the sites listed were regularly visited by a significant number of respondents.

DEMOGRAPHICS

- Education

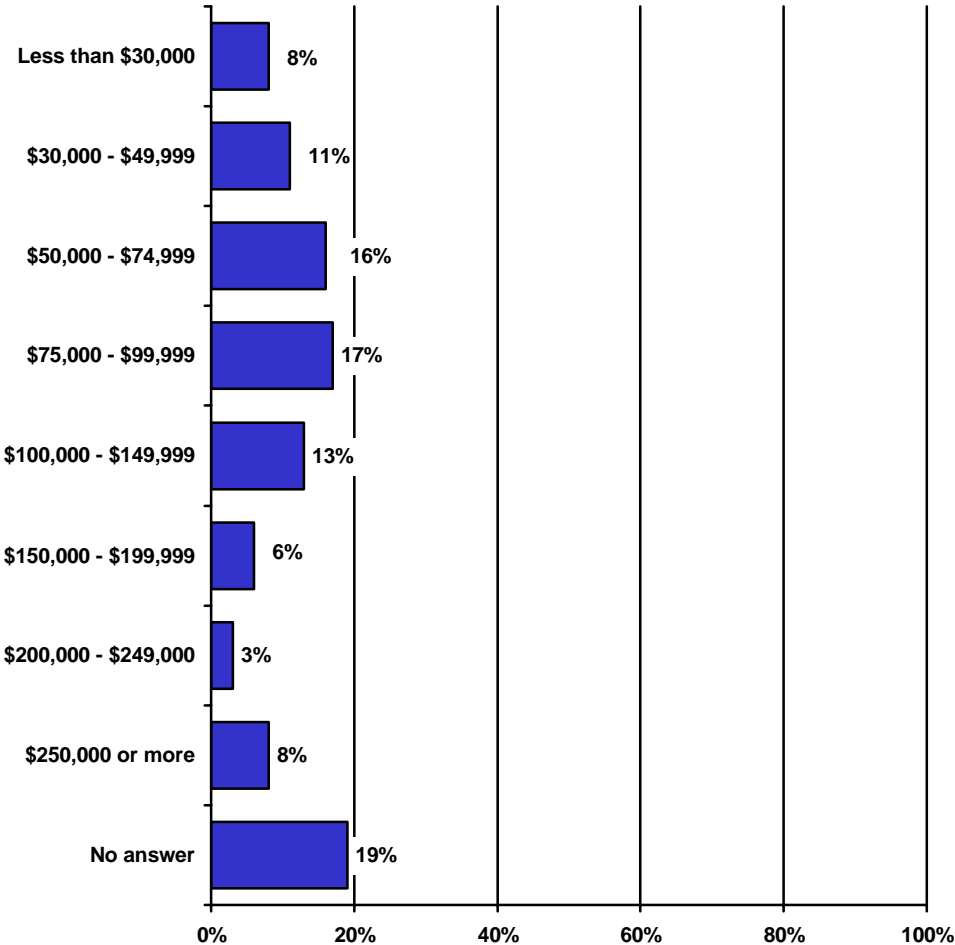
Close to two-fifths of respondents (38%) have a Bachelor's degree or higher in a music-related field, while 42% have a Bachelor's degree or higher in a non-music related field.



DEMOGRAPHICS

- Household Income

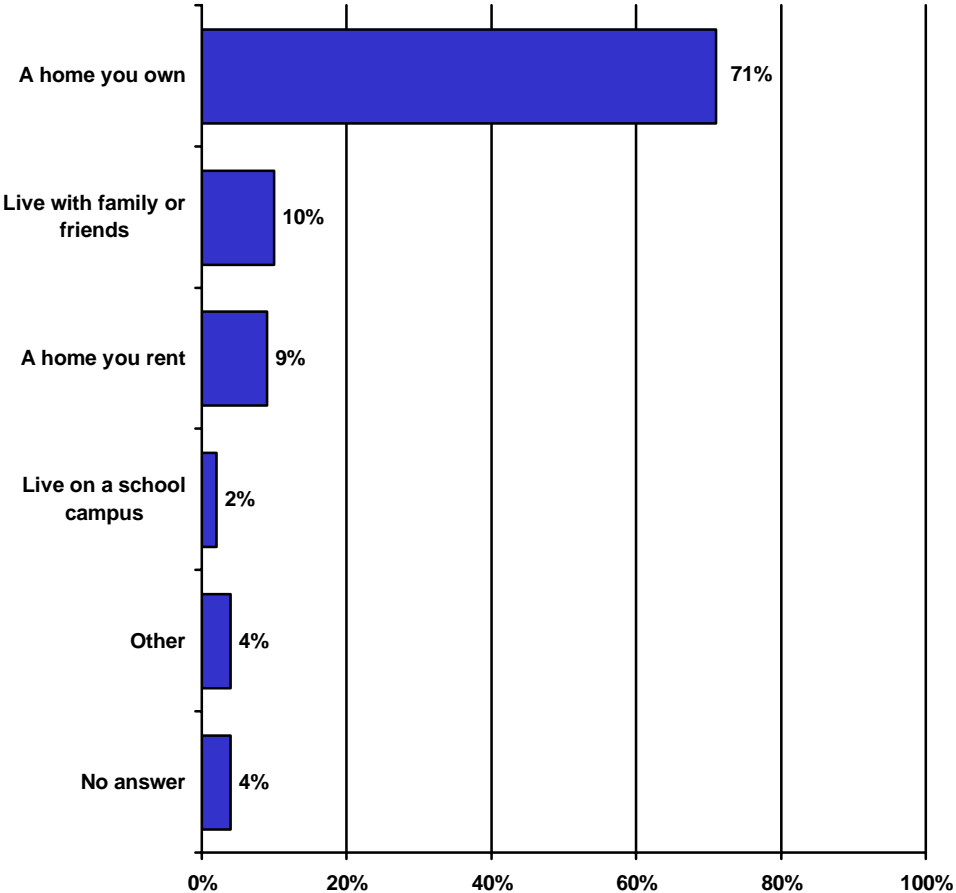
Close to one-third of respondents (30%) report a total annual household income of \$100,000 or more.



DEMOGRAPHICS

- **Current Residence**

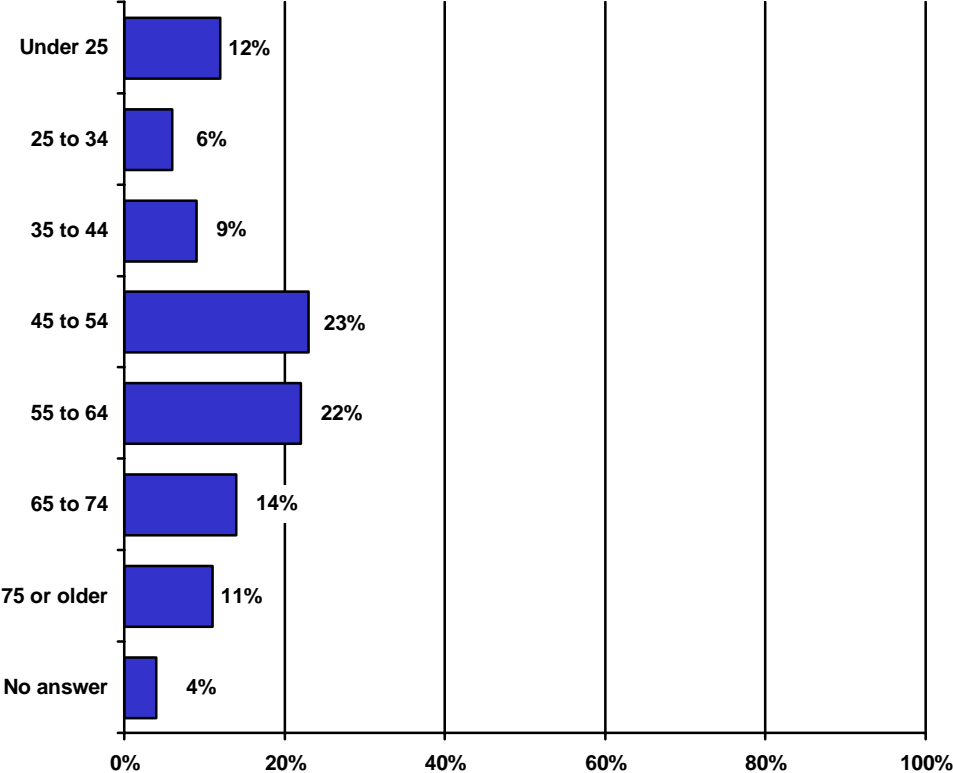
A majority of respondents (71%) live in a home they own.



DEMOGRAPHICS

- Age

The average age of respondents is 51.



- Gender

One-half of respondents (50%) are male, while 48% are female.

- Additional Comments

Respondents were given a chance to add any additional comments they have regarding *Strings*. A complete list of these comments can be found starting on page 85.