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Charles V. Reed

Oral examination:

Date July 22, 1953

Committee:

C W Ephraim, Chairman

Herbert C. Graebner

Herbert E. Sim

Cary B. Graham

E. O. Comfort

Thesis title:

A History of the Band Instrument Industry in Elkhart, Indiana

Thesis approved in final form:

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Major Professor C W Ephraim

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A HISTORY OF BAND INSTRUMENT MANUFACTURING IN ELKHART, INDIANA

by

Charles Vandeveer Reed

A thesis submitted in partial fulfillment of the requirements for the degree of Master of Science
College of Business Administration

Division of Graduate Instruction
Butler University
Indianapolis
July 1953

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PART I: DEVELOPMENT OF BAND INSTRUMENT MANUFACTURING IN ELKHART, INDIANA UP TO WORLD WAR I - 1915

INTRODUCTION

Band instruments, [1] directly and indirectly, play a part in the lives of almost everyone. To the professional musician band instruments are the "tools of the trade." To the music student band instruments are a part of educational equipment. To many others band instruments serve as a source of enjoyment and entertainment.

In the United States, in 1953, the manufacture of band instruments is well established with a large part of the industry centered in Elkhart, Indiana. Three major problems will be considered in this thesis: Why the band instrument industry was started in Elkhart, what factors led to the growth and expansion of the industry, and why, after almost eighty years, Elkhart has retained its prominence as the nation's band instrument center.

The success of the first Elkhart instrument firm, which was founded because of a particular incident, led to the entry of other firms. As these firms grew and as their outputs increased Elkhart-made instruments became recognized over a larger market area. Band instrument production, dominated eighty years ago by western European firms, has been successfully carried on by these American firms as their forces of skilled workmen have grown. Improved methods and techniques in the manufacturing processes have

[1] For the purpose of this study "band instruments" may be defined as those of the woodwind, brass, and percussion families of instruments commonly used in bands and orchestras.

enabled the Elkhart firms to produce quality instruments while planning and promotion have developed new markets and accelerated the merchandising methods for distributing the finished products.

As the industry became established in Elkhart more new firms were started and mergers with outside firms occurred, all helping to centralize the industry.

Difficulties and problems arose; among them were financial difficulties, changing demand for instruments, need to change merchandising methods, and increased competition from foreign producers. The manner in which these problems have been worked out has been of much importance to the successful growth of the industry.

Also of much significance to the industry has been its contribution to the war effort during World War II and the subsequent reconversion to band instrument production. Since 1951, restrictions of raw materials have influenced the operations of the firms. All these factors will be considered in analyzing the basic problems of this thesis.

CHAPTER I

ORIGIN OF THE INDUSTRY IN ELKHART, INDIANA

The manufacture of band instruments in the United States is relatively new, having been developed in this country largely within the last seventy-eight years. Previously, not only most of the musicians were foreigners, native-born Germans predominating, but practically all of the instruments used were of foreign manufacture. Probably the first instrument factory in the country was Samuel Graves & Company, established at Winchester, New Hampshire in 1824. This and the other early firms manufactured "custom-built" instruments to specific orders. Handicraft methods of production characterized these firms which pioneered the band instrument industry in the United States.

It was not until after 1873 , that the industry began to develop in earnest. In that year in Elkhart, Indiana a curious incident took place which resulted in the founding of the firm which today is the world's largest manufacturer of band instruments in the city which has become the center of the industry in the United States.

This firm was founded by Charles Gerard Conn, an individual whose private and political activities were as interesting and spectacular as his business career. Charles G. Conn was born in Ontario County, New York on January 29, 1844, the son of Charles J. Conn, and the grandson of James Conn, a New York state farmer of Irish stock. In 1850, the Charles J. Conn family moved from New York to Three Rivers, Michigan and the next year to Elkhart,

Indiana. Charles J. Conn taught in the Elkhart public schools where he became superintendent of schools.[1.]

C. G. Conn went to school in Elkhart for about 10 years before enlisting as a drummer boy in the Union Army. He advanced in the army, attaining the rank of captain by his twenty-first birthday. A part of his military service was served as a Confederate prisoner in the dreaded Andersonville Prison. In an unsuccessful escape attempt Conn and a fellow officer were tracked down by bloodhounds and recaptured. After the war Conn attained the rank of colonel in the reserves. He was frequently referred to as "Colonel" Conn throughout his life. For his military service he received the Congressional Medal of Honor.[2.]

Conn was elected mayor of Elkhart, 1880-1883, on the Democratic ticket in a predominantly Republican town. The same normally Republican district gave him a seat on the Democratic side in the lower house of the state legislature in Indianapolis where he worked for the passage of important constructive legislation and gave much attention to the solution of labor problems. In 1892, Conn was elected to the United States Congress.[3.]

While in Washington, D.C. he purchased the Washington Times, a morning newspaper. As owner and publisher of this paper he so strongly attacked municipal mismanagement and those in power in Washington, D.C. that he decided it would be wise to leave the capital city for a "vacation" in Canada until things cooled off. In Elkhart, in 1890, Conn founded the Daily Truth. The Elkhart Truth, as it is now known, is still being published.

The reason Charles G. Conn started making band instruments may be

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1. Abraham E. Weaver, A Standard History of Elkhart County (Chicago: American Historical Society, 1916), p. 931.
2. Indianapolis Star, January 15, 1931, p. 11.
3. Weaver, Op.Cit., p. 361.

traced to a blow in the mouth received in a street fight in Elkhart. After the Civil War Conn returned to Elkhart where he operated a small grocery and bakery business. As a side line he did silver plating and made rubber stamps. He also supplemented his small income by directing and playing in the Elkhart Town Band. As a result of a fistfight Conn's lip was split so badly that he could not play his cornet. By combining his skills at silver plating and stamp making he succeeded in making a pliable cornet mouthpiece so that he could play in spite of his injury.[1.]

The mouthpiece invented by Conn as a result of his injury, the "elastic face," became popular and the demand for it increased. They proved to be better than those generally used. In addition, the pliable mouthpiece could be adapted for use by players with irregular mouth structures, such as protruding lower jaws or protruding upper teeth. From 1873 to 1875, Conn made these rubber-silver mouthpieces on a lathe he had improvised from an old sewing machine frame. In 1875, he rented an old

---

1. It has been well established that Charles G. Conn received a split lip as a result of a fist fight. As the story has been passed down the versions have differed somewhat. This may be partly due to the fact that Conn engaged in any number of such encounters.

In the "Musical Truth" (Elkhart: Publication of C. G. Conn Ltd., 1924), Vol. XIV, No. 35, p. 3, as reprinted from Jacobs Band & Orchestra Monthly, the account is that Conn, a cornet player with Haverly's Minstrels, received a split lip in a fist fight with a bass player in the band.

Ben Gordon Whitehead wrote in the Indianapolis News, February 1, 1902, p. 79, that a drunken bully on horseback decided that in "wildwest" fashion he would ride his horse through the Elkhart band in which young Conn was playing cornet. Conn pulled the bully from the horse and the fight ensued.

Another general account of this fight was reported by Rufus Jarman, "Big Noise in Indiana," Saturday Evening Post, February 7, 1948, p.60. During 1947, Mr. Jarman spent several weeks in the factory of C. G. Conn Ltd. gathering material for the above-mentioned article. This article is considered accurate by those in the firm familiar with the history of the company. Interview with Mr. R. H. Bressler, Assistant Secretary of C. G. Conn Ltd., November 28, 1952.

wooden building and started making complete instruments. He thought that here and there improvements might be made in the cornet. He secured patents, each one representing an advancement in the instrument. [1] His ideas were practical and his knowledge of the instrument was intimate. The new cornet met with popular favor. [2]

By the end of 1875 Conn discovered that his instrument making was successful enough so that he could devote his full time to making it. He soon realized that his operations had grown beyond one-man production. He hired Eugene Dupont, a horn maker who had come to this country from France, to work for him. Dupont was the inventor of an improved valve action for cornets, the "light valve." [3] Another of Conn's early employees was Jacob Burkle, a brass horn maker.

The next record of the growth of this firm shows that Conn hired fifteen French craftsmen from an English factory to work for him. [4] It is not reported whether or not Conn recruited these workers from the English factories himself, at this time. As the business grew, another story was added to the frame building, near Main and Jackson Streets, and in 1878, the business was moved into an old planing mill at Jackson and Elkhart Avenue, by which time 60 men were employed. This factory was destroyed by fire on January 29, 1883, the 39th birthday of Colonel Conn. The bigger factory that replaced it was likewise destroyed on May 22, 1910, after which the present plant of C. G. Conn Ltd. was erected. [5]

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1. Weaver, A Standard History of Elkhart County (Chicago, 1916), p. 361.

2. Ben Gordon Whitehead, Indianapolis News, February 1, 1902, p. 79, from Cottman Collection - Biography and Scrapbook Collection. (Indianapolis Ind.: State Library Collection.)

3. "Light valve," a mechanical improvement enabling cornet valves to be operated more smoothly and with less effort.

4. Elkhart Truth ("Progress Issue") Oct. 27, 1924. The year in which these French workers were hired is not stated.

5. Loc.Cit.

In 1887, Colonel Conn opened a branch house in Worcester, Massachusetts for the eastern trade, purchasing the works of Isaac Fish, one of the oldest instrument makers in the United States. [1.]

It was from these beginnings that band instrument manufacturing in Elkhart developed. Until Conn started production most of the instruments used in this country were foreign made. Skilled instrument makers from the best factories in Europe under the direction of C. G. Conn firmly established the band instrument industry in the United States. As the success of Conn's firm became apparent other firms entered the industry in Elkhart. Practically all of the founders of these Elkhart firms received their start and experience in the Conn factories. The promotional activity by those in the industry which served to establish the prominence of Elkhart as a band instrument center will be discussed in the following chapter.

One of the men in the Conn organization whose methods resembled Conn's in some respects (see p 16) was James Boyer. Born in Elkhart in 1871, and educated in the Elkhart public schools and Valparaiso University, he turned to a musical career. From 1892-1893 he studied at the "Chicago Musical College." In 1894 he became director of the "American Grand Opera Company" with which he made an extended tour through the Orient. Returning to the United States in 1896, he assumed charge of Conn's harmony department. In 1900 he became director of the Conn Conservatory of Music in Elkhart. This conservatory, established earlier that year by Charles G. Conn as a promotional project, trained musicians to play instruments and instructed them in music theory and principles. The school was staffed by musicians

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1. George W. Butler, Manual of Elkhart (Elkhart: Mennonite Publishing Company, no date listed), pages not numbered.

and music teachers who had been hired by Mr. Conn. This conservatory of music helped attract musicians to Elkhart, and served as a means of associating music and musical instruments with Elkhart and with Conn. The conservatory was publicized through the Conn Company's publications. In 1911, Mr. Boyer became sales manager of C. G. Conn & Company and later general manager.

Colonel Conn reserved for himself sole rights of ownership in the firm, but he obtained credit whenever and to whatever extent necessary to satisfy his demands for capital. The firm was not incorporated until 1915 after Conn had sold his interest. Much of Conn's capital was obtained on the basis of his personal promissory notes. It was not uncommon to find a room in the back of one of the Elkhart banks partly filled with instruments Conn had put up as collateral for a loan. The plant of the firm itself was mortgaged whenever necessary to raise capital.

Until 1895, when F. A. Buescher established The Buescher Band Instrument Company, Conn was the only manufacturer of band instruments in Elkhart. Among other firms to enter were The Martin Band Instrument Company founded in 1904, Blessing Band Instrument Company, 1908, C. W. Osgood (no longer existing) 1912 and the Pedler Company, 1914. The founders of these firms with one exception owed their start to Conn by whom they had been employed.

Ferdinand August Buescher, who had learned the band instrument trade in Germany, was induced to come to Elkhart from Germany by C. G. Conn. After a period in the Conn factory he organized The Buescher Manufacturing Company about 1895. Between 1898 and 1903 this firm employed a force of over 100 workers, almost as many as C. G. Conn & Company, which employed about 150 in 1896. In 1904, the firm was reorganized as Buescher Band

Instrument Company with F. A. Buescher as president. [1].

J. H. Martin was born in Saxony, Germany in 1835. He brought his family to New York in 1857, and a short time later moved to Chicago. Having learned the instrument making trade in Germany, he set up his own business in Chicago where he operated on a small scale. This business was wiped out by the great fire of 1871. In 1872, J. H. Martin walked from Chicago to Elkhart where he was employed by C. G. Conn as a journeyman until 1885. From that year until 1904 when he returned to Elkhart, he followed his trade in New York and Philadelphia.

His son Henry began to learn the business of manufacturing band instruments at the age of 15. He, too, spent several years in the Conn factory. From 1900 until 1903, Henry Martin was superintendent for the firm of J. W. York & Son at Grand Rapids, Michigan, which began operations in 1882. In 1904, he and his father founded the J. H. Martin Band Instrument Company, which was reorganized in 1905 as the Martin Band Instrument Company with Henry Martin as president after the death of J. H. Martin in 1905. [2].

The Blessing Band Instrument Company, Inc., was established in Elkhart in 1908, by Emil K. Blessing, who at one time had been employed by C. G. Conn. His two sons, Karl, Jr. and Frederick, later joined the Blessing firm. [3].

Other pre-World War I firms in Elkhart were C. W. Osgood, founded

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1. Anthony Deahl, 20th Century History and Biographical Record of Elkhart County, Indiana (Chicago: Lewis Publishing Company, 1905), p. 237.

2. Weaver, A Standard History of Elkhart County (Chicago, 1916), p. 585.

3. Purchaser's Guide to the Music Industries (New York, 1948), p. 90; interview with R. H. Bressler, Assistant Secretary, C. G. Conn Ltd., November 28, 1952.

in 1912, and The Pedler Company, founded in 1914. [1] The Pedler Company, producing woodwind instruments only, was founded by the Pedler family which formerly made instruments in England.

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[1] Elkhart Truth, "Progress Number," October 27, 1924. Little information is available concerning the C. W. Osgood firm. No record of the firm can be found after 1915. Reasons for the firm stopping operation are not known.

CHAPTER II

MANUFACTURING METHODS AND LABOR

As the Elkhart band instrument industry grew in size of output and in number of firms it was recognized more and more as the source of better instruments. The creative ideas and ingenuity of those in the early industry resulted in better methods of production and improved instruments. Skilled, experienced craftsmen were present to carry out the ideas and inventions. Capable, farsighted management made use of the improved methods and ideas by directing production toward an improved output.

Conn learned the trade through experimentation in Elkhart; but he also, as stated above, brought in skilled craftsmen trained in Europe.[1] Germans, French, and English had been active in the manufacture of band and other musical instruments and were, in fact, the primary sources of his labor supply. Two of Conn's early employees, Charles and Julius Stenberg, skilled engravers, were natives of Sweden.

Foreign craftsmen were directly recruited from European factories by Conn himself. C. G. Conn made numerous trips to the European factories to study conditions and hire workers. As Conn's factory established a name for itself, workers here and abroad, needing employment or in search of better opportunities, gravitated to Elkhart of their own accord. A number of the craftsmen in the Elkhart firms had been active as professional musicians before settling in Elkhart where they applied their knowledge and experience

1. No instance has been uncovered in which this recruiting of foreign labor by Conn was in violation of the contract labor law.

with the instruments to the construction of band instruments. This flow of skilled labor into Elkhart enabled Conn and other producers to expand their output. It also provided a labor source from which individuals entering the industry, establishing firms of their own, could draw. Workers entering the industry who were not already skilled were trained by means of a journeyman system in which they were trained on the job. Many sons have followed their father's trades, learning them as they worked side by side. This journeyman system was employed by the Elkhart firms until after reconversion from World War II war work. As workers began to be trained on the job native born Americans gradually became the predominating body in the labor force. This has been true particularly since 1900.

Until the 1920's band instrument manufacturing consisted of a series of hand operations. Some mechanization of production was employed by the Elkhart firms, but most of the work still required delicate hand processes. When a firm decided to produce a horn the job was given to a craftsman who did practically all the work, making the parts and assembling them. Many instruments were custom made. Musicians and band directors would come to the factories and personally supervise the work, experimenting and testing as the instrument passed the various stages of construction. In this way new models were developed and improvements discovered. Naturally the quality of an instrument depended largely upon the craftsman's skill and judgment. Popular models of instruments were produced for stock, but the hand process of production was still employed until the 1920's.

Because the manufacturing process depended so largely on skilled labor, good employee-employer-relationships were essential. The Elkhart firms were quick to realize this situation. In 1892, Colonel Conn

established in his factory a profit sharing plan by which his workmen were entitled to share in the company's profits on the basis of wages received and number of years they had been employed. [1] The first year resulted in a surplus of $9,000 being divided among the more than 100 employees. Conn believed this plan produced a better class of workmen, insured better work, and greater profits. By 1896, $60,000 had been distributed among the employees who at that time numbered between 100 and 150. [2] Profit sharing was continued by the Conn company until World War II war conversion. Profit sharing and bonus plans have been offered by other firms so as to maintain good relations.

Conn's interest in good employee relations was evidenced also by his term in the Indiana legislature. Much of his work was devoted to legislation to better labor conditions. Unionization of labor was also accepted, apparently with emthusiasm, by C. G. Conn at an early date. In 1906, the employees of C. G. Conn & Company became members of the Metal Polishers, Buffers, Platers, Brass Moulders, Brass and Silver Workers Union of North America which is affiliated with the American Federation of Labor.[3]

The following quotation explains in Mr. Conn's words his attitude toward unionization of employees: [4]

> "...first I consider it a good business proposition. Next I favor union labor when there can be no strikes or lockouts, for the reason that it affords advantages to working people which cannot otherwise be obtained. I have as intelligent, faithful and industrious a lot of working people as ever were assembled under one roof, and it is my duty as an employer to adopt and put in force any and all measures which shall in my opinion promote their welfare."

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1. Pictorial & Biographical Memoirs of Elkhart and St. Joseph Counties, Indiana (Chicago: Goodspeed Bros., 1893), pp. 26-28.
2. Ibid., p. 28.
3. "C. G. Conn's Truth," December 1906, p. 1.
4. The Elkhart Daily Truth, October 29, 1906.

However, this statement seems to indicate that Mr. Conn favored a union which was not strong enough to determine policy or take action such as a strike. He continued with this statement:

> "The most important reason, however, for placing my factory in the union ranks is because the power and influences of organized labor have become essential both to public good and the maintenance of the American wage standard."[1].

Mr. Conn did not state the extent to which labor had a voice in determining the wage standard.

C. G. Conn & Company of Elkhart was the first band instrument factory to fully unionize its plant. Except the Buescher Band Instrument Company the other Elkhart manufacturers employing more than 10 production workers have followed Conn's example of union affiliation. The Buescher Band Instrument Company continued to follow an open shop policy. As satisfactory working conditions were provided, the workers of this firm by majority vote agreed to continue non-union production. The differences in wages between the union firms and the Buescher Company were not significant enough to react to the advantage or disadvantage of either group.

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1. Loc. cit., p. 1.

CHAPTER III

MERCHANDISING METHODS

Advertising is a very fundamental part of the merchandising of band instruments. Word of mouth recommendations sold the first instruments. Charles G. Conn was very well aware of the importance of advertising as a selling device from the beginning of his venture into the industry. He, himself, was a sort of world character and showman. He had many eccentricities and capitalized on them to attract national (and international) publicity which he in turn focused on his firm.

On one occasion Conn published a picture, undoubtedly with permission, of himself with King Edward VII and Queen Alexandra of England and John Philip Sousa. In July 1905 he had this picture published in his company publication "C. G. Conn's Musical Truth," with the large heading: "Three Kings and a Queen: King and Queen of England, 'March King', and the King of Instrument Makers."

With two others Conn is supposed to have been in the first automobile to go overland to the West Coast. He was a lavish spender and entertainer, quite a sportsman, and the owner of three ocean going yachts, one of which, according to "C. G. Conn's Truth" (see page 18), was one of the largest of its day. All these things helped make him and his company known to the public.

Conn's advertising methods may be seen in this example:

> Each season he would present free to the 60-piece band of Hi Henry's Minstrels a complete set of gold-plated instruments.

> Hi Henry reciprocated by making it plain to everybody wherever he appeared just where the instruments came from, and by requesting from the city government a squadron of police to accompany the band every time it paraded. The instruments were so priceless, he said, that he feared banditti might descend upon the parade and snatch the horns from the musicians' hands. [1]

James Boyer, sales manager and general manager of C. G. Conn & Company, continued the well-established custom of directing sales by means of personal acquaintances with leading musicians and by extensive entertainment. It has often been said by those in the music business that "Jim" Boyer knew more musicians than anybody in the business, and more important, they knew him, all of which he developed into exploited advertising by associating Conn instruments with these outstanding, well-known musicians. In return for the testimonials of these musicians discounts were given and outright gifts of instruments were not infrequent. This form of sales promotion was much used by the whole industry. The firms generally gave 20 percent discounts to professional musicians of which there was a surprisingly large number, and gave instruments to, or even paid certain well known musicians to use their instruments.

Another very effective advertising device was a monthly magazine type publication put out by Colonel Conn called "C. G. Conn's Truth," later renamed "Musical Truth." The mailing list for this publication included over 100,000 musicians all over the country. First issued in February 1895, the publication was continued until the 1940's when due to wartime conversion and other factors it was discontinued. In addition to photographs and drawings of Conn instruments, this publication contained testimonials of prominent musicians praising Conn instruments. Advancements in the manufacture of

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1. Rufus Jarman, "Big Noise in Indiana," Saturday Evening Post, February 14, 1948, p. 60.

instruments and new models were presented to the musicians through this paper. Current happenings in the band and band instrument world were reviewed; many new musicians who had had successful seasons were recognized; and an obituary column was included. An editorial column discussed current trends in the music business. Another very important function of the paper was to provide musicians a chance to offer their services, seek others to work for them, or to offer used instruments for sale. Typical of these want ads are those found in the January 1897 issue of "C. G. Conn's Truth:"

> "WANTED: Good cornet or clarinet player, who is a barber. Address: W. A. Todd, Richmond, Kentucky.
>
> "WANTED: An experienced druggist, who speaks German and plays anything in brass; cornet or clarinet preferred. References required. Address F. A. Pennell, McCook, Nebraska.
>
> "SITUATION WANTED: By good German musician, string bass and tuba player, harness maker by trade. Address H. Kline, Bluffton, Indiana."

This publication also gave Colonel Conn an excellent opportunity to combat the advertising and claims of his competitors. In fact, Conn was quite ruthless in discrediting his competitors. One particular firm upon which he concentrated his attacks was that of J. W. Pepper of Williamstown, Pennsylvania. These attacks were carried so far that Conn was finally able to announce triumphantly in his "C. G. Conn's Truth", in March 1899, that "J. W. Pepper has withdrawn from the industry."

Prior to 1915, several methods were used in the sale and distribution of band instruments. Whenever possible, musicians were encouraged to come to Elkhart to visit the various plants. Tours of the factories were arranged, luncheons and dinners provided, boat rides made available, and concerts arranged at which the guests were given the opportunity to perform. Each firm tried to outdo the others. For those who could not come to Elkhart

individuals in numerous towns and cities acted as agents in the distribution and sale of instruments for the firms. Local bandmasters and music teachers were frequently selected to be agents. Much business was derived as the result of the recommendations of leading musicians whose friendship had been cultivated by the particular firm involved. Also, a mail order business was carried on by the firms directly with the purchaser prior to World WarI.

An installment plan for selling band instruments was employed by the C. G. Conn Company. All transportation charges were paid by the factory. A six-day trial period was offered, and a charge of 5 percent was made for using the installment method of paying. A contract was signed by the buyer and a down payment of 20 percent made. The remaining 80 percent was to be made in 10 equal monthly payments. [1.]

After 1900, Elkhart-made band instruments began to be recognized as choice instruments not only in the United States, but also through the world. After resigning as director of the United States Marine Band in 1892, John Philip Sousa toured Europe with his own band for the first time. The skill of Sousa's men and the dexterity with which they handled their American-made instruments, most of which were made in Elkhart, offered proof to the European musicians that the American-made instruments were well made. [2.] Successful tours by bands such as Sousa's, both in and out of the country, became a very important factor in establishing the position of Elkhart as a leader in the manufacture of band instruments. Ben Gordon Whitehead reported in the Indianapolis News, February 1, 1902, that "Conn exports more band instruments than all the foreign factories import into this country." He

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1. "C. G. Conn's Truth," January 1904, p. 5.

2. In several issues of "C. G. Conn's Truth" in the early 1900's signed testimonials were published stating that Conn instruments were used exclusively by Sousa's band.

goes on to say that "Sousa's band has no metal wind instrument that is not made by the Conn factory." [1].

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1. Ben Gordon Whitehead, Indianapolis News, February 1, 1902, p. 80, in Cottman Collection - Biography and Scrapbook Collection (Indianapolis: Indiana State Library Collection).

PART II: DEVELOPMENT OF THE INDUSTRY FROM 1915

CHAPTER IV

THE ELKHART FIRMS, FINANCE AND MERCHANDISING

The period of the close of the century was the town band era in which bands were very popular and the Saturday night band concert on the town square was a big occasion. There followed a period of guitar and mandolin popularity which resulted in a reduced demand for band instruments.

Meanwhile, C. G. Conn & Company grew and expanded. Even with a reduced demand for band instruments the firm was well established and prospered. However, as the result of the two fires which did much damage to his factories and because of his personal and political activities, Conn's personal finances were rapidly being depleted. After 1900, Mr. Conn, who was the sole owner of the firm until 1915, began to devote less time to the business and more to personal interests. He traveled a great deal, including several trips to Europe, buying expensive paintings, statues, and other objects of art. These expenditures, as well as his outlay for yachts and whatever he took a fancy to, put a great financial strain on his company, from which he withdrew the needed money. He would wire the office to forward the amount needed even if it became necessary for the firm to go into debt to do so. Hence, although the firm was making money these extensive withdrawals left the firm with insufficient operating capital--sometimes not enough to meet the payroll. Inasmuch as the firm did not have the cash to pay its bills, by 1914, the firm no longer commanded a favorable

credit rating. [1.]

In 1915, Colonel Conn asked Eugene Atkins, an Elkhart promoter, to find a buyer for the firm. Atkins went to Wauseon, Ohio where he arranged the sale of the firm to Carl Diamond Greenleaf, who at that time was operating a flour mill which his father had built into a very successful business. Although C. D. Greenleaf had no previous experience in band instrument manufacturing, he thought this firm could be operated profitably by following sound business principles which had proved successful in his milling business. Greenleaf paid approximately $400,000 to Colonel Conn for the firm and assumed a mortgage of $180,000 and various debts. [2.] He paid the back debts of the firm and made sure that operating capital was adequate to cover operating expenses.

The firm name C. G. Conn & Company was changed to C. G. Conn Ltd. when, on August 15, 1915, the firm was incorporated under the corporate laws of Indiana. Its financial condition and growth are indicated by a comparative income account for the year ending December 31, 1919, the earliest available, which is shown in Table 1. with comparable statements for the years 1923 and 1929.

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1. Interview with Richard H. Bressler, Assistant Secretary C. G. Conn Ltd., March 29, 1953.

2. Rufus Jarman, "Big Noise in Indiana," Saturday Evening Post, February 7, 1948, p. 61.

TABLE 1.

COMPARATIVE INCOME ACCOUNT, YEARS ENDED DECEMBER 31

C. G. CONN LTD.
(Selected Years)

	1919 [1.]	1923	1929
Gross Revenue	$1,767,036	$3,041,314	$3,914,889
Operating Expenses	1,520,435	2,587,208	3,578,097
Depreciation	67,251	30,199	24,149
Taxes	22,000	52,000	
Net Income	157,350	371,907	312,643
Other Income	14,154	44,201	79,301
Total Income	171,504	416,108	391,944
Fixed Charges	35,363	31,136	54,651
Taxes			31,763
Balance	136,141	384,972	305,530 *
Margin of Safety [/]	79%	93%	
Preferred Dividend	28,000	38,522	37,771
Common Dividend	36,000	72,000	121,254
Surplus	72,141	274,450	146,505

Source: Moody's Analysis of Investments - Industrial Securities (New York: Moody's Investor's Service, 1924) pp. 1902-3. Also, 1932, p. 1653. The report published in 1924 was the first in which Moody's reported on C. G. Conn Ltd.

* Does not include share of profits of subsidiaries, $57,950.

1. 1919 is the earliest year of which Moody's has a record.

/ Margin of Safety is balance for year over total income.

Table 2. gives the Income Statement for C. G. Conn Ltd. at the end of the 1950-51 fiscal year.

TABLE 2.

COMPARATIVE INCOME ACCOUNT

C. G. CONN LTD.

Year ended April 30, 1951.

	Dollars
Net Sales	$ 9,261,164.00
Cost of Sales	6,276,959.00
Selling, etc. exp.	1,892,942.00
Operating Profit	1,091,262.00
Other Income	62,358.00
Total Income	1,153,620.00
Other Deductions:	
Federal Income Tax	574,336.00
Reserves	-----
Net Profit	468,353.00
Prev. Earned Surplus	1,870,068.00
7% pfd. div.	18,837.00
6% pfd. A. div.	9,606.00
Comm. div.	175,570.00
Pr. yr. inc. tax	527.00
Earned Surplus 4/30/51	2,133,881.00
Earn.7% pfd. sh.	174.04
Earn.6% pfd. A. sh.	287.78

Source: Moody's Analysis of Investments - Industrial Securities (New York: Moody's Investor's Service, 1952) p. 547.

Moody's Investor's Service reported that in 1923 C. G. Conn Ltd. manufactured 1,800 different types of musical instruments in its plant of 180,000 square feet of floor space. Shown in Table 3. is a General Balance Sheet of the firm for the year ended December 31, 1923, the earliest of which Moody's shows a record.

TABLE 3.

GENERAL BALANCE SHEET

C. G. CONN LTD.
December 31, 1923

ASSETS:

Plant, equip., etc.	$ 633,889
Patents, etc.	243,034
Investments	881,082
Inventories	1,044,567
Cash	59,115
Bills, & Accts. Rec.	649,236
Insurance, Cash Value	5,800
Deferred Charges	64,531
Total	$3,581,254

LIABILITIES:

Preferred Stock	$ 560,569
Common Stock	1,200,000
Bonded Debt	750,000
Notes Payable	40,000
Current Liabilities	328,237
Employees' Profit Sharing	50,200
Reserve for Depreciation	228,062
Other Reserves	155,000
Surplus	269,186
Total	$3,581,254

In 1923, C. G. Conn Ltd. had current assets of $1,758,718; current liabilities were $1,340,281; the net current assets were $418,437. The financial standing of the firm in 1923 may be compared with that of 1951, when at the end of the fiscal year, April 30th, current assets were $5,080,096, current liabilities were $1,357,418, and net current assets were $3,722,678.[1.]

In 1953 C. G. Conn Ltd. is a corporation which has stock listed in the over-the-counter market in Chicago. It has both common and 6 percent and 7 percent cumulative preferred stocks, but no bonds. In April, 1953, the common stock was quoted at about $7.00 bid and $8.00 ask a share. The preferred stock with a $100.00 par value is not listed on the market, being all held by the Greenleaf family and associates. On December 31, 1951 there were 294 holders of the preferred stock and 771 holders of common stock.[2.] In 1950, according to a company publication, Dun & Bradstreet's credit rating of C. G. Conn Ltd. was AAA-1, good for over one million dollars credit.[3.]

Since the change of ownership of the firm in 1915, several wholly owned subsidiaries and divisions manufacturing drums, pianos, and other musical instruments have been organized by C. G. Conn Ltd. and others have been added to the corporate family through mergers. In 1917, C. G. Conn Ltd., in order to meet the demand for lower priced instruments, established the Pan-American Band Instrument Company. This firm was designed to produce instruments suitable for use by individuals not requiring the more high priced instruments of better quality. As the school band movement developed, the demand for moderately priced instruments increased rapidly. The Pan-American

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1. Moody's Analysis of Investments - Industrial Securities, (New York: Moody's Investor's Service, 1924) p. 1902; 1952, p. 547.
2. Ibid., p. 547.
3. "A Young Man Looks to the Future," Company Publication of C. G. Conn Ltd., 1950, p. 9.

Band Instrument Company is now operated as a division of C. G. Conn Ltd.

About eight years after World War I interest in marching and military groups began to revive and drum and bugle corps flourished as never before. In Louisville, Kentucky in 1929, over 300 of these organizations assembled. [1]

The presence of these and similar groups had a favorable effect upon band instrument manufacturers who made the bugles. The movement also stimulated the drum industry. Responding to this increase in the demand for drums and drummers' equipment, C. G. Conn Ltd. purchased two of the world's largest drum manufacturers.

In 1929, the Leedy Manufacturing Company of Indianapolis, Indiana was purchased by Conn.

Ulysses G. Leedy was born in Fostoria, Ohio and early in life traveled with a road show as a drummer. He settled in Indianapolis in 1890, where he played for three years in the Empire Theater orchestra. In 1894 he moved to Toledo, Ohio. While playing there in the People's Theater orchestra he made a patented drum stand, and then, the first Leedy drums in 1896. He returned to Indianapolis in 1897, and a year later opened the Leedy-Cooley Manufacturing Company in the basement of the building situated where the Traction Terminal Building is now located. Samuel Cooley and Leedy, partners in this firm, were both members of the English Opera House orchestra at this time. [2]

In 1903, Leedy bought Cooley's interest in the company and moved the plant to East Palmer Street. Herman E. Winterhoff, a native of Elkhart,

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1. George H. Way, then sales manager Leedy Drum Company and a judge of this convention. Interview June 27, 1953.

2. Robert Early, "Leedy Company Boasts World's Largest Drum Factory," Indianapolis Star, May 19, 1929, Pr. 7, p. 6.

became associated with the firm, serving as vice president. In 1916, he invented and patented the Leedy vibraphone. The Leedy firm pioneered in production of bells and xylophones. After selling out in 1929, U. G. Leedy remained in Indianapolis, where he was employed as an officer of another firm not in the drum business.

About 1922, George H. Way was employed by the Leedy Manufacturing Company. Before this, as a young drummer playing for a theater in Providence, Rhode Island, he had acquired a large group of accessories, whistles, and other devices to imitate sounds. Under Way's guidance accessories became as large a part of the industry as the manufacture of drums themselves. George Way lived several years in Toronto where he organized the Advance Music Company of Toronto, Leedy distributor in Canada. After returning to Indianapolis, Mr. Way became sales and advertising manager for the Leedy Manufacturing Company. In April 1953, he is active in the Leedy and Ludwig Drum Division of Elkhart.

In 1929, the Leedy Manufacturing Company of Indianapolis boasted the world's largest drum factory, producing 900 articles of drummer equipment and also sound equipment and accessories for sound motion pictures. The company, besides being a large producer of standard lines of all drummer equipment, specialized in custom-made articles for drummers in all parts of the world. An imported stock of merchandise was also handled by the firm. This included temple blocks in eight sizes, instruments used for centuries by the priests of China which have never undergone any change. Others were gongs from China, tom toms, and cymbals from Turkey. [1]

The Leedy firm since has been combined with the firm of Ludwig and Ludwig of Chicago, another firm with an outstanding reputation in the field

1. Ibid., p. 6.

of drummer equipment, also acquired in that year. The floor space of the Leedy and the Ludwig plants when acquired was 160,000 square feet. The Leedy company was moved to Elkhart in 1930, and the Ludwig company shortly before World War II. When the firms were moved to Elkhart the original plants in Indianapolis and Chicago were disposed of.

Before acquiring these drum firmsC. G. Conn Ltd. manufactured a complete line of drums and equipment under its own name. By merging with these two drum producers it was able to strengthen its position. In 1949, the company absorbed all its subsidiary companies into the parent corporation, C. G. Conn Ltd. The subsidiaries are now operated as divisions. After being acquired, and until the 1949 corporation liquidation, the Leedy and Ludwig firms continued selling through separate, competing sales organizations. Since 1949, drums have been made by the Leedy and Ludwig Drum Division of C. G. Conn Ltd. and are sold under that trade name. The Conn Band Instrument Division no longer markets drums, although moderately priced drums made in the drum division are sold under the trade name of Pan-American Band Instruments. The Leedy and Ludwig Drum Division was reported in 1948 to be the largest manufacturer of drummers' equipment. [1] This acquisition of other firms was an important step in the centralization of the band instrument industry in Elkhart.

William F. Ludwig, after selling his firm, Ludwig and Ludwig, founded in 1910, to C. G. Conn Ltd., continued in the drum manufacturing business in Chicago where he organized the W. F. L. Drum Company with W. F. Ludwig, Jr., his son.

The Conn corporation extended its coverage of the musical

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1. Purchasers Guide to the Music Industry (New York: Music Trades Corp., 1948), pp. 103-112.

instrument field when, in 1940, it purchased the Haddorff Piano Company of Rockford, Illinois. In 1941, the Straube Piano Company of Chicago, Illinois was purchased but operations were discontinued in 1942. The piano factories which are now operated as separate divisions are located in Rockford, Illinois.

As a result of the research and experimental work carried on during World War II, an electronics division of the Conn corporation was established with its own factory in Elkhart. The major product of this division is the "Connsonata" electronic organ. Other tuning and testing equipment is manufactured for the market by this plant.

The Conn firm, including the drum and electronic divisions, now operates three plants in Elkhart, having 250,000, 24,000 and 52,000 square feet of floor space. The two larger plants are owned outright and the smaller one is leased. [1.]

The trademarks of C. G. Conn Ltd. include: Conn (a complete line of wind instruments and accessories); Pan-American (moderately priced wind, string, and percussion instruments); Leedy and Ludwig (drummers' instruments); Connsonata (electronic organs); Continental (complete line of quality musical merchandise sold at wholesale); Haddorff (high grade pianos); Bush and Gerts (medium priced pianos). [2.]

At the time Greenleaf purchased the Conn company in 1915, the methods of selling and promoting practiced by Charles G. Conn, described in Chapter III, were characteristic throughout the industry. These methods were very distressing to Greenleaf, a man of conservative business practice. At

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1. Moody's Analysis of Investments - Industrial Securities (New York: Moody's Investor's Service, 1952) p. 547.
2. Standard and Poor's Industrial Guide (New York; Standard and Poor's Corporation, 1950) p. 6173.

the time Charles G. Conn sold out there were about eight principal instrument companies in this country, including Conn. Most of them were doing business by selling instruments mainly by mail-order.

One of Greenleaf's first acts was to discontinue direct mail-order sales by establishing outlets with authorized retail dealers. Mr. Greenleaf established the policy that "you cannot sell to a dealer and also to the dealer's customers". He also stopped the practice of giving instruments to musicians, at the same time encouraging other firms to follow his example to this end. Greenleaf led a movement for industry-wide cooperation. He organized the Band Instrument Manufacturers Association, serving as its president from 1916 to 1927. He also persuaded the instrument manufacturers to join the Music Industries Chamber of Commerce, a branch of the United States Chamber of Commerce. Greenleaf served as director of this organization, of which the major purpose was to promote interest in music, from 1917 to 1927.[1.]

At the annual meeting of the Band Instrument Manufacturers Association in Chicago in June, 1923, a resolution was adopted to the effect that the practice of subsidizing musicians to use certain makes of band instruments through an extraordinary discount or presentation process be stopped. It was the unanimous opinion of those present that this was a move in the right direction for better business. [2.]

A "Code of Ethics" set up by the Band Instrument Manufacturers Association was approved by the Federal Trade Commission in 1923. One aim of this code was to stop the "subsidizing" of prominent musicians. The commission announced that it would "take cognizance of violations" of the code.[3.]

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1. Who's Who in America (Chicago: A. N. Marquis Company, 1952) p. 971.
2. "Musical Truth," October 1923, p. 7.
3. Ibid., January 1924, p.9.

Under Greenleaf's management, C. G. Conn Ltd. has distributed through authorized dealerships of which, in 1953, there are almost one thousand. This firm, since 1915, has maintained company-owned branch store operations, but this experience has not proved satisfactory due to the difficulty of obtaining store managers to handle the specialized product. In 1929, the firm operated selling branches in about 22 major cities in the United States and Canada; but since then almost all of them have been disposed of in favor of privately owned dealerships. Before 1933, the Pan-American Band Instrument Company distributed through jobbers. Since then it has used retail dealer outlets.

Since about 1923 products of the band instrument industry have been distributed through dealers, jobbers, and agents. Generally, the smaller firms distribute through jobbers and agents because of the higher cost of sales and distribution when carried on by individual firms, while the larger manufacturers sell directly to retail dealers. The methods of distribution of C. G. Conn Ltd. have been explained. The methods of distribution employed by the other Elkhart firms manufacturing band instruments will be discussed below.

Buescher Band Instrument Company products are also handled by retail music dealers which are located in most cities. These instruments are marketed under the trade name "True Tone" band instruments. The Elkhart Band Instrument Company, a subsidiary purchased by Buescher in 1928, produces moderately priced instruments which are marketed through dealers under the "Windsor" trade name.

The Martin Band Instrument Company was reorganized in 1919, when the Martin family sold the majority interest of the firm to O. P. Bassett.

Upon the death of Mr. Bassett, in December 1931, the majority interest in the firm went to his heirs. Fred A. Holtz, formerly sales manager, was elected president and general manager. At the present time Robert L. Stahr is president and general manager of the firm while Mr. Holtz is president of The Pedler Company, a subsidiary. F. A. Holtz, Jr. is sales manager and H. J. Martin is comptroller of the Martin Company. The Martin Company, which manufactures brass instruments and saxophones, distributes its entire output through retail dealers. The Pedler Company manufactures woodwind instruments and custom-built clarinets which are all distributed through retail dealers. This firm is owned by the Martin Band Instrument Company.

The Blessing Band Instrument Company, Inc. manufactures three grades of trumpets, cornets, and trombones. Carl Fischer Musical Instrument Company, Inc., New York, is the exclusive distributor for these products.

Harry Pedler & Sons, a firm organized in 1919 by an English family, manufactures band and orchestra instruments under the trade-marks "American Triumph" and "Art" which are distributed through jobbers. This firm is in no way connected with The Pedler Company mentioned above.

The W. T. Armstrong Company, established in 1932 by the late W. T. Armstrong, who for many years was the manager of the accessory department of C. G. Conn Ltd., is now managed by his son, Edward Armstrong. The initial output of the firm consisted of flutes for jobber distribution. In 1939, an entire line of flutes was manufactured. Now, the factory maintains a direct, non-exclusive dealer arrangement through which all its instruments are distributed.

The Artley Manufacturing Company was established in 1939. The firm turns out about 150 flutes and piccolos a month which are distributed

by the Hershman Musical Instrument Company of New York.

The Linton Manufacturing Company was founded in 1946, and is supervised by Jack Linton. The firm manufactures oboes, bassoons, and other woodwinds. All woodwinds produced by this firm were distributed through the Hershman Musical Instrument Company, New York, wholesalers, but are now sold direct to dealers by the firm.

H. & A. Selmer, Inc. manufactures, distributes, and imports instruments. This firm is an affiliate of a French firm, Henri Selme et Cie, The three French plants are now being managed by the fifth generation of the Selmer family. The Selmer firm bought the plant of Adolphe (Antoine) Sax on Rue Myrha, Paris. Alexandre Selmer, who was a leading clarinet player in France and later in the United States, operated a retail store in New York to sell the instruments made by his family's firm in France. Charles G. Conn originally owned 44 percent of the Selmer-Conn Company of New York, but there is now no connection between the Conn and Selmer firms, and the Selmer-Conn Company no longer exists. In 1910, Alexandre Selmer returned to Paris, leaving the New York business in the hands of George Bundy, a former student, who directed Selmer branch operations in the United States. In 1927, the United States' firm of H. & A. (Henri and Alexandre) Selmer was established at its present location in Elkhart. George Bundy served as president of the company until his death, April 5, 1951. In 1941 the firm bought the piano manufacturing firm of Jesse French & Sons in New Castle, Indiana. In 1952 the Elkhart Selmer plant employed approximately 300 employees. Some woodwind instruments are manufactured in the Elkhart plant, but the firm is a small manufacturer and a large distributor and importer. Selmer (Paris) instruments are made in France by Henri Selme et Cie and distributed, serviced and

guaranteed in the United States by H. & A. Selmer, Inc. [1].

In addition to the standard lines of band instruments mentioned above, two of the Elkhart band instrument manufacturers make their own instrument cases. These firms are The Pedler Company, which also supplies the Martin Band Instrument Company and C. G. Conn Ltd., which supplies its divisions and also the Buescher Company. The other instrument firms buy cases from firms specializing in case manufacturing. In Elkhart, the Elkhart Wood Products Company makes cases for band instruments. Generally, the manufacturing of cases for band instruments requires skills and equipment not closely associated with band instrument manufacturing, making it more economical, particularly for the smaller firms, to buy cases already made. Instrument case making provides another example in which diversification in the Elkhart band instrument industry has occurred.

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1. "Selmer," Company publication of the Selmer Company, Elkhart, Indiana, 1952, pp. 1-3.

CHAPTER V

GROWTH OF THE MARKETS SINCE 1919

During World War I Government purchases of band instruments to equip the many Army bands helped the manufacturers recuperate from the previous period of reduced business. Then, in 1919 with the age of "Jazz" a large market developed. President C. D. Greenleaf in an address to the Band Instrument Manufacturers Association of America in 1919 in Chicago stated that the band instrument business in the United States was but a small part of the musical instrument industry. About 2,000 were engaged in making brass and woodwind instruments and drums, and the production in 1918 in retail value did not exceed $5,000,000 if it reached that amount. He further stated:

> "To my mind, the very smallness of the business is an assurance of its continued prosperity and even of its expansion. While unfortunately no statistics are available, giving what might be called the 'saturation point' in the retail distribution of band instruments, I believe...that we have as much assurance of being able to operate our present plants to capacity as we have of most things in the world."[1].

During the "twenties" the "saxophone craze" increased tremendously the popularity of that instrument. The first American-made saxophone was made in the factory of C. G. Conn in 1888. Mr. Conn had been quick to realize the possibilities of the saxophone and brought to his company E. A. LeFebre, a well known saxophone player, who had been a friend of Antoine (or Adolphe) Sax, the inventor. LeFebre had come to America as a saxophone

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1. "Musical Truth," November 1919, p.3.

soloist with Gilmore's Band. Under the direction and supervision of LeFebre working in the Conn factory, the saxophone was brought to the highest state of development which had been attained up to that time. An important result of the saxophone craze was not just that many more instruments were sold but that it led to a transition in the whole field of instrument making.[1].

Following 1919, a non-professional consumer market grew out of the school band movement which has been a tremendous factor in the growth of the band instrument industry, now comprising the greatest consumer element in the industry. It has been largely since 1920 that the school band movement has really progressed. A number of steps were required to bring this movement to the position it holds today, comprised of almost three million school musicians. For this development the instrument manufacturers, who realized the potential market for their product if bands could be organized as a part of the school curriculum along with other acknowledged subjects, were largely responsible.

At the 14th National Conference of Music Educators held in St. Joseph, Missouri in April 1921, James F. Boyer of C.G. Conn Ltd. attended the meetings and spoke in behalf of the movement. Following this he reported in the "Musical Truth" that the school band movement was making progress. [2]. In 1927, upon the recommendation of the Department of Superintendence of the National Education Association, a resolution was passed giving music equal consideration and support with other basic subjects.

The first national band contest, held in Chicago in 1923, was sponsored by the Music Industries Chamber of Commerce, 15 to 20 bands, a

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1. "Musical Truth," October 1923, p. 7. The transition in instrument making will be discussed in Chapter VI.
2. "Musical Truth," June 1921, p.2.

large number for that time, competing. The first state band contests were held in 1924, sponsored by the Music Supervisors National Conference, the National Bureau for the Advancement of Music, and the Band Instrument Manufacturers Association. By 1933, 74 bands competed in the National Band Contest in which over 5,000 musicians took part. In 1949, it was estimated there were about 30,000 bands and 40,000 orchestras in our schools comprised of almost 3,000,000 musicians. [1.]

In 1925, C. G. Conn Ltd. initiated a program to aid the organization of school bands. The firm offered to sell, with no down payment, instruments which could be used on a rental plan of $5.00 a month until the list price had been reached. These instruments could be returned at any time with no further obligation. The firm also had a band service department which provided books and information on organizing school bands and gave recommendations for teaching methods. [2.] The Conn rental plan for beginners is now being operated through dealers in connection with the school programs.

Much of the success of the school band movement has been the result of properly trained teachers. In the early 1920's local bandmasters and musicians were the music teachers. As the number of school bands increased an acute shortage of trained teachers and band leaders arose. C. G. Conn Ltd., recognizing that this situation must be corrected if the movement was to progress, established in 1923 the Conn National School of Music in Chicago under the direction of Fred N. Innes, who previously had been a prominent bandman. Although an enrollment fee was charged, the school was financed by C. G. Conn Ltd. as a promotional program.

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1. "Conn Sales Training School - Training Manual," publication of C. G. Conn Ltd., 1949, Sec. I, pp. 8-9.
2. "Musical Truth," September 1925, p. 3.

The purpose of this school was to train teachers to direct school bands and give instruction on the various instruments. The company's executives reasoned that the school band movement, and in turn the demand for instruments, would be stimulated if qualified teachers were available to organize and direct the individual bands. Those attending the school recognized the importance of the school band program and wanted to prepare themselves for the many teaching opportunities which were available. Many of those attending were already musicians, some highly skilled but untrained in teaching instruments other than those they played. After the term of instruction had been completed the students were given diplomas. As graduates of the Conn National School of Music they were accepted as teachers by the schools and as having the qualifications to teach and direct the school bands. [1.]

As soon as state and private schools of higher learning included comparable programs in their curriculum there was no further need for this school of music. The school was discontinued in 1932.

Summer music camps have sprung up in all parts of the country to enable students to continue their band participation throughout the year.

"Those noises from the music classroom may make even a fond parent wince, but they's music to the ears of America's instrument manufacturers and salesmen." [2.] Since World War II the number of school bands has grown by 40 percent and the number of school orchestras by an even greater percentage.

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1. "Musical Truth," October 1926, p.5.
2. "Music Industry Cashes in by Blowing its own Horn," Business Week, September 22, 1951, pp. 70.

This was the report of the American Music Conference, the music industry's promotion agency. [1.]

The American Music Conference was organized in 1947, to try to reverse a downward trend in sales. Six trade associations representing all segments of the industry, from manufacturer to retailer, contribute $100,000 a year to finance the work. The promotion idea is based on a long range program to arouse public interest in music so as to develop markets for musical instruments. This conference decided that the best place to concentrate its efforts was in the schools. For years, individual band instrument companies had been developing this field, but the music conference systematized and expanded this approach. [2.]

In 1950, the American Music Conference estimated that about 13.5% of the nation's 25 million elementary school children were getting some music instruction through their schools. [3.]

A "National Survey of Public Interest in Music" was conducted for the American Music Conference by A. S. Bennet Associates. The results of this study were released March 1, 1948. The research covered the musical preferences, attitudes, and activities of 12,815 individuals. 3760 personal interviews were made with a cross section of American families in 74 cities, towns and rural areas.

Results of this survey showed:

> Approximately 30% of the families have one or more members who now play a musical instrument. 25% have one or more former players while 45% have no family member who has ever played a musical instrument.

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1. Ibid., pp. 70-72.
2. "Music Industry Cashes in By Blowing Its Own Horn," Business Week, September 22, 1951.
3. "Music, Music, Music," Business Week, July 22, 1950, p. 32.

One out of every eight individuals in the United States now plays a musical instrument.

More children 10 to 14 years old play instruments than any other age group. 36.9% of girls and 22.7% of boys in this group play.

Of the total instruments played the piano represents 63% of the total. Wind instruments (trumpet and cornet, clarinet, saxophone, and trombone) form the second largest group.

85% of those interviewed think classes in musical instrument playing should be a part of public school curriculum.

Only 20% of those who now play an instrument had lessons at school.

95% of the families interviewed think each child should have a chance to find out if he is interested in playing an instrument. [1.]

The American Music Conference reported in 1948 that if 10 percent more school children started playing, the market for musical instruments would be expanded by approximately 27 percent. [2.] This organization also found a steady increase in the number of music dealers who have adopted store-studio plans to offer adult music instruction.

The American Music Conference further stated that about 82% of all band instrument sales were to schools and school children in 1950, whereas sales to professional musicians were steadily shrinking. The instrument makers blamed this decline of sales to professionals on the amusement tax which they reasoned acts to keep people out of restaurants. Many of the smaller restaurants either can't afford to have an orchestra, or fear that by having one they might keep out patrons who don't want to pay the tax. [3.]

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1. "National Survey of Public Interest in Music," conducted for American Music Conference, A. S. Bennet Associates, New York, 1948, pts. I-VII.

2. "Music Drive On," Business Week, April 3, 1948, p. 73.

3. "Music, Music, Music," Business Week, July 22, 1950, p. 32.

Unlike the amusement tax which has had a detrimental effect, band tax laws for the support of municipal bands have, of course, been of aid to band programs. In 1921 the legislature of the state of Iowa enacted a band tax law which provided that a municipality could levy a tax for the support of its band after it had been authorized by a referendum vote by the citizens of each municipality. The question could be brought up for the vote by a petition of a certain percent of qualified voters. [1.]

The Iowa Band Tax Law, fathered by Major George W. Landers of Clarinda, Iowa, has served as a model for other states. Since its passage, sixteen states have adopted laws which provide municipal support for band concerts and other forms of music, and ten others have passed laws which serve this purpose in various ways. These municipal bands have provided additional markets for the band instrument manufacturers.

Still other markets for instruments are the symphony orchestras, including particularly the community symphony orchestras. The number of symphony orchestras in the United States has increased from 9 in 1900, to 50 in 1923, to almost 300 at the time of World War II, and to approximately 800 in 1952. [2]

Another factor which has helped create an interest in music and the desire to play an instrument is the popularity of radio and television.

In the early 1920's the transition was from great professional bands to the school bands. Today, with the instrument manufacturers the question is what happens to the thousands of trained musicians after they leave school. In 1951, industry of the United States was expected to spend over $500,000,000 for industrial recreation programs as reported in the Wall Street

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1. "Musical Truth," October, 1924, p. 7.
2. Helen M. Thompson "The Community Symphony Orchestra," American Symphony Orchestra League, Charleston, West Virginia, 1952, p. 2.

Journal on May 29, 1951, although very little of this amount was spent for music. This shows the opportunity available for manufacturers in the musical instrument industry by developing interest in industrial band programs. Almost 300,000 persons who have had musical training and who have been playing or singing in groups graduate each year from our schools and colleges. Many would continue with their music if there were organizations in which they could participate.

Shorter work weeks, earlier retirement, and vacations with pay place a greater responsibility on industry and focus more and more attention upon utilization of employee's spare time. The idea of music in industry is not new. Several banks in New York organized a glee club in 1870; John Wanamaker installed a pipe organ in his Philadelphia store in 1876. The Norfolk and Western Railroad started an employee band in 1883 which has been in continuous existence ever since. [1].

Today the manufacturers of band instruments realizing the potential of the industrial band movement and the effect its growth would have on their business are directing much of their promotion to it.

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1. "Industrial Bands and Orchestras," (Chicago: National Industrial Recreation Association, 1953, pp. 3-5.

CHAPTER VI

PRODUCTION METHODS, SKILLS, RAW MATERIALS AND TESTING

"To make fine musical instruments requires a unique combination of craftsmanship and modern metal working knowhow." [1.] Forming, bending, spinning, joining, heat treating and finishing all must be done with precision if the instrument is to pass the final electronic tone test.

In 1928, Conn made almost 90 different models of trombones. In 1953 the number has been reduced to about 30 trombone models. The fact that even today a number of models of a particular type instrument are offered is due to the demand for horns in different keys, of assorted bore sizes, bell sizes, pitches and finishes.

At present (1953) it requires 55,000 different manufacturing operations to produce the Conn line of instruments. An alto saxophone requires 535 parts, including 35 keys. It takes 34 manufacturing operations to make one key. A regular clarinet has 248 parts; a bass clarinet has 397 parts. It requires 6 full days of a skilled craftsman's time to assemble a bass clarinet. There are 178 parts in a cornet or a trumpet, 187 in a baritone horn, 229 in a sousaphone, and 267 in a French horn. It takes an average of 3 months to build one instrument from its start on the assembly line until it is ready for shipment. [2.]

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1. Ray Fisher, "How to Put Brass in a Band," American Machinist, May 15, 1950.
2. Rufus Jarman, "Big Noise in Indiana," Saturday Evening Post, February 14, 1948, p. 59.

A number of phases of production are necessary to manufacture band instruments:

Engineering to establish standards.

Production to make the product to detailed standards.

Inspection to see that standards are upheld.

Promotion to extend present markets and develop new ones.

Sales to distribute product.

Credits and collection to handle accounts.

Cost accounting and auditing to control and allocate costs.

Through a patented process, Conn has been able to smooth brass tubing when it is bent into the many shapes and curves required by the various instruments. A hydraulic expansion process is used. The parts are placed in steel dies; then, cold water at pressures of from 2,000 to 4,000 pounds per square inch is forced into the tubing. The result is a curve as smooth on the inside as on the outside. This firm developed the first and only electrolytically formed one-piece seamless bell (Coprion) in 1935.

The Conn firm uses 654 raw materials of which sheet brass is the principal one. Red brass consisting of 70 percent copper and 30 percent zinc is commonly used, but more brilliant tones require yellow brass consisting of 63 percent copper and 37 percent zinc. [1]

Few, if any other, industries employ such a wide variety of materials to produce their products. To manufacture band instruments a firm uses pure silver, coin silver, pure gold, pure copper, brass and plastics. Maple, hickory, Honduras rosewood, grenadilla wood from South Africa and Mozambique, ebony and reed are used. The grenadilla wood is used to make clarinet and oboe bodies. Less than 40 percent of the wood received from

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1. Fisher , op. cit.

Africa is fit for use, and after being obtained it must be seasoned in unheated lofts for 5 to 15 years.

Other materials used are real and artificial leather for instrument cases, fish skin and bladderskins or "skivers" from England for pads, lambs wool for drum beaters and polishing, animal glue, and horse tail plumes for glockenspiels. Other items are felt, special oils, sulfuric acid and cyanide, silica sand for sand blasting, plush cloth, cork, rosin, tar and pitch. Rubber, special string, polishing rouge and pumice, shellac and lacquers, chalk, canvas, and paper are also used.

Virtually all woods are used in the manufacture of drums and drummers' equipment, but drum shells are made generally of maple. Rosewood is used for marimba bars. Drum shells are veneered with a plastic material (marine pearl) which is very hard and makes the drum very difficult to dent or damage. This material is made in varied ornamental colors. Tympani are made from solid sheets of copper. Calf skin parchments are used for drum heads and goat and calf gut are used for drum snares.

During the "Jazz Age," the 1920's, almost the entire output of instruments of the Buescher Band Instrument Company was saxophones as was that of The Martin Band Instrument Company. The C. G. Conn Ltd. factory was devoting about three-fourths of its production to making saxophones. Between 1925 Conn sold over 500,000 saxophones. [1] Faced by a growing demand for these instruments, Mr. Greenleaf, hoping to cut cost and speed production, introduced assembly line production into the industry. The Conn factory succeeded in mass-producing saxophones and later produced other instruments by the assembly-line method. Other advantages of this method were: standards

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1. Training Manual, Conn Sales Training School, publication of C. G. Conn Ltd., 1949, Sec. II, p. 5.

and tolerances to which its horns had to conform were established, and instrument parts were standardized, making replacement of worn or damaged parts more easy. Another effect of the introduction of the assembly-line process was to reduce somewhat the number of models of instruments offered. The "Musical Truth" of October, 1923 reported that the Conn factory manufactured over 1800 kinds and styles of instruments and over 50,000 parts of instruments. [1.]

An electronic device for measuring the pitch of new instruments measures the amount a tone is sharp or flat to 1/100 of a semitone. Tuners are geared to a radio receiving set that picks up the note "A-440" which is broadcast constantly from the Bureau of Standards in Washington. [2.] This pitch was accepted as a standard by the United States Bureau of Standards in 1920, and by the Music Supervisors' National Conference on March 30, 1925.

It is interesting to compare this method of testing new instruments with that of Colonel Conn in the early days of the company. It was his practice, then, to hire the outstanding performers and virtuosos of the day to work for him. They would examine and play each instrument produced and then write a letter to be sent to the buyer giving testimony with respect to the quality and tone of that specific instrument. It must be remembered that the standardization of product now present was not possible with the hand made instruments of that day. In 1896, E. A. LeFebre, the outstanding saxophone authority and player of the country, examined and played each saxophone, Jules Levy each cornet and valved instrument, H. A. Davis the flutes and piccolos, and Henry Geiss the clarinets made in the Conn factory. This method did have some merit as the hard earned reputations of the well

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1. "Musical Truth," October, 1923, p. 9.
2. A-440 is called low pitch and is the standard in the United States. England and Canada have changed in the last few years from high pitch A-457 to A-440. France still used A-435 in 1953.

known musicians were offered as the guarantee of quality.

Until the "Stroboconn" (see page 47 below) was developed, instruments were checked against a reed organ for comparative tests. The "Stroboconn" frequency measuring device is the only standard other than opinion and personal likes and dislikes as to what the intonation should be. The "Stroboconn" measures frequency, not tone quality. It has long been acknowledged by the music educators that standards must be developed. The Conn research department is now working with the leading music educators in these developments. Conn now manufactures electronic frequency measuring devices commercially for bands, orchestras, piano tuners, teachers, physics and acoustical-research laboratories, and for the aircraft industry where they are used for calibrating tachometers and other flight instruments. During the last war these instruments were adopted and purchased by the Wright Field Air Force laboratories and by the Navy Bureau of Research as the most accurate frequency measuring device.

The Conn research department, established in 1928, is now the only one operated on a full time basis by concerns manufacturing band instruments. The research engineers of the Conn firm have, in their opinion, been able to reduce to an exact science the business of making musical sounds.

A number of testing devices are also used to ensure quality of product. A spectroscope is used for the analysis of brass, copper, nickel and other metals. An X-Ray is used to study key castings for woodwinds and tubing for trombone slides, brass for bells and other parts. A comparator magnifies objects up to 100 times actual size. Super michrometers which are accurate to .000030 of an inch or 1/100 of the diameter of a human hair are used. Metals are studied with Rockwell hardness testers and by using equipment to measure tensile strength and compressibility. Another piece of

equipment found in the Conn factory is an automatic silver plating tank which is one of the world's largest. [1.]

In addition to improvements in manufacturing methods, new instruments have been designed and created in the Elkhart plants. In 1889, the first all metal clarinet was manufactured by C. G. Conn & Company. This was followed, in 1890, with the first double bell euphonium. In 1898, the first "Sousaphone" was invented and manufactured in the Conn factory. Theodore Pounder, an English-born craftsman trained in the Conn factory and still with that firm in 1953, performed the actual construction of this instrument. This particular instrument plays a principal role in the current (1952-3) movie "Stars & Stripes Forever," the story of John Philip Sousa for whom the instrument was made and named. Other achievements to come from the C. G. Conn Ltd. factory have been the first bell front tuba in 1909, the first American sarrousaphone in 1921, the first slender trumpet in 1928, and the first American bassoon in 1940.

The industry, with the exception of Conn, largely manufactures its product as hand made instruments rather than as mass-produced goods. As far as possible, Conn uses mass-production methods. The Pedler Company, in its advertising, stresses the fact that its instruments are "custombuilt". The Selmer Company in its advertising states that its instruments made in the United States are "bench made".

Several unusual products or instruments have come from the Conn factory. In 1922, C. D. Greenleaf presented as a personal gift to the University of Chicago from which he was graduated in 1899, a complete set of 100 instruments and uniforms. Included in this equipment was the world's largest bass drum which was manufactured in the factory of C. G.

[1.] Observations from a tour of the plant of C. G. Conn Ltd.

Conn Ltd. The drum is eight feet two inches in diameter and is still the largest drum ever manufactured.

In 1925, a saxophone 10½ times as large as a regular playable instrument was built to scale as an advertising stunt to be used outside the Conn New York Store. A human approximately 60 feet tall would have been required to play it. Also, in 1925, the Conn factory made a tambourine 36 inches in diameter which was to be used by a circus elephant. An "immencephone" was made for Jesse L. Lasky to be used in a vaudeville act. The bell of this instrument, 12 feet in diameter, was shaped like a "Victrola" horn. Holes were present through which a 10-piece band blew bell-less instruments. Some of the players stood, some sat, and one played from flat on his back.

Other unusual, custom-made instruments have been made, such as a saxophone for one-armed musician Al Miller. Another was an arrangement of 3 saxophones to be played by one person all at one time. Billy True manipulated this instrument with both hands and a foot pedal and three mouthpieces.

PART III: DEVELOPMENTS IN THE INDUSTRY SINCE 1941

CHAPTER VII

WARTIME CONVERSION

A. Conversion during World War II.

The ability of the band instrument manufacturers to diversify their outputs and adapt their production to other lines was demonstrated during World War II when all of the Elkhart band instrument factories contributed to the war effort. Because of the multiple skills available and the diversified machinery and equipment present, most of the firms converted almost entirely to the production of war goods.

The manufactureof all musical instruments containing by weight 10 percent or more of critical materials (including copper, nickel, zinc, chromium, aluminum, cork and steel) between March 1, 1942 and May 30, 1942 were limited to a percentage of the usage of these critical materials during 1940.[1] As of May 31, 1942 all stocks of the firms and branches were frozen. Stocks of instruments were subsequently acquired by the armed services. Under an appeal for relief from the order authorizing the above-mentioned restrictions the band instrument manufacturers were allowed to make use of additional materials on hand so as to complete the instruments then in process with the understanding that the finished instruments would be

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1. The Federal Register, The National Archives of the United States, Washington, D.C., February 18, 1942, p. 1066. The restricting order was "General Limitation Order No. L-37 to restrict the production of musical instruments" enacted February 17, 1942.

reserved for the armed services.[1] The appeal, which was granted, enabled the firms to use their labor forces until war contracts could be undertaken. The production of band instruments for civilian use was finally stopped on June 1, 1942 and not resumed until 1946.[2] Only repairs were permitted in the interval.

The conversion from band instrument production to that of war goods was carried out as rapidly as possible, but a number of difficulties were encountered. Delays in receiving new equipment, tools, and materials were experienced. Although the band instrument firms had top priorities for obtaining these goods, due to the nature of the contracts, many other firms had equally high priorities causing the demand for certain equipment and materials of limited supply to be high. Tool making to meet the new production requirements was a slow process.

Firms generally expanded their production facilities to meet production schedules by enlarging plants and employing more labor. On December 31, 1941, C. G. Conn Ltd. employed 988; on December 31, 1943, that firm employed 1,850. By December 31, 1947, Conn's employment had dropped back to 1,305 employees; on December 31, 1951, 956 were employed.[3]

Firms manufacturing band instruments required skilled workmen trained in performing delicate work to close tolerances. Although these skilled workers readily adjusted to the production of war work in accordance with the detailed government specifications, a problem of training new personnel arose inasmuch as many of the additional workers employed by the firms during the war were from farms and homes, with no previous experience

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1. Ibid., p. 4036.
2. Moody's Analysis of Investments - Industrial Securities (New York: Moody's Investor's Service), 1945, p. 229.
3. Ibid., 1942, p. 952; 1944, p. 994; 1948, p. 263; 1951, p. 804.

in factory work.

In 1943 C. G. Conn Ltd. received the first Army-Navy "E" Award to be presented to a band instrument factory for outstanding war production. A number of wartime products were manufactured by the Conn Company. Special trunks and boxes and canvas bags were made in the case and drum factories. In the instrument factory, silver and gold electroplating were performed. Various machine parts were manufactured. Aircraft flight instruments such as altimeters, thermal compensators for airborne radio, gyro-horizon indicators and de-icing equipment were produced. Navy navigation equipment - compasses and binnacles - were made. Because of the wartime conversion, the Conn Company's electronic research department was greatly expanded. Testing equipment such as sensitive vibration and amplitude measuring devices were made. Working with the Air Forces laboratories at Wright Field, the Conn engineers invented and developed several new testing devices for aircraft.[1] The piano subsidiaries which also converted made furniture, wooden gliders, boxes, and wooden lockers.

Some of these products were manufactured through direct contracts with the government, others through subcontracts. The testing devices were manufactured and the electronic research was carried on by the firm working directly with the service branches. Most of the work for the Air Forces was performed in connection with the Wright-Patterson Air Force Base at Dayton, Ohio.

The other band instrument firms also negotiated for war material contracts with the armed services and for subcontracts with leading

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1. "History of C. G. Conn in World War II" (Elkhart: Unpublished historical records of C. G. Conn Ltd., 1947), Vol. I, II, and III.

manufacturers for production of materials to which their facilities could be adapted. The Buescher Band Instrument Company devoted much of its wartime production to the manufacture of sensitive altimeters. For outstanding work in this field the firm received an Army-Navy "E" Award.

B. Reconversion after World War II.

At the end of the war when the demand for war goods had decreased to the extent that it could be supplied by the firms normally in these lines of production, the band instrument firms reconverted to their normal patterns of production. Conversion to production of war materials in 1942 had been expedited by the national emergency and the immediate demand for those goods. While in the post-war period the civilian demand for band instruments was pressing, reconversion took place more slowly than conversion had. Plant space and equipment had to be re-allocated to band instrument production. Time was consumed and difficulties encountered in setting up an efficient production schedule. Inasmuch as the labor force had to be reduced in size, personnel problems arose. This situation, which posed major problems, will be discussed in the following chapter.

In spite of World War II, most of the existing bands continued even though many teachers were in the service. Older musicians and women kept the bands going. School attendance and the total number of players increased. As instruments wore out and were no longer of service, a tremendous demand for new instruments developed. After the war, the accumulated demand for band instruments was so great that the producers had not been able to fulfill the demand at the time (1950) new restrictions were placed on the firms.

C. Korean War period.

Between 1946 and 1950 the band instrument firms concentrated on filling the demand which had accumulated during the war years. The production

of instruments received a setback when with the United States' active participation in the Korean War the government again placed rigid controls on critical materials used by the band instrument manufacturers. Using 1950, as the base period, the firms in 1952 were limited to 35 percent of the copper content raw material on a poundage basis of that used in the base year. This control of raw materials caused a realignment of production within firms from instruments using a lot of brass to those using less, such as from sousaphones to cornets. This situation most seriously affected those firms manufacturing a full line of instruments. In addition to curtailment of copper usage, another critical material restriction which caused hardships on domestic manufacturers was that prohibiting the use of nickel silver for ornamental purposes on instruments. The firms subject to this particular restriction protested that manufacturers not subject to these restrictions obtained a competitive advantage by producing instruments, primarily woodwinds, containing much nickel silver trim which gave them an attractive appearance.

The regulation limiting raw material usage did not affect all firms in the industry equally. Many of the small producers which did not make full lines of instruments fell in the minimum usage class and were not restricted in their raw material purchasing. The result has been that larger firms were penalized because of their size and scale of operations. In a bulletin to its members, in December 1951, the National Association of Band Instrument Manufacturers reported on this situation: "M-47A (the restriction order) does not now limit manufacturers so far as small users are concerned... this enables small operators and garage manufacturers to triple or quadruple their production and hire more employees and turn out more brass instruments.

...It would be possible for dozens of small manufacturers to actually increase their production and new manufacturers start in the business, ultimately using up more brass than would be saved by all of the large manufacturers having to cut down their production." [1.] In February of 1953, the restriction on brass usage was removed, but the other restrictions were still in effect at that time. Unlike the all-out conversion during World War II, little war work is being done in the period 1950 to 1953. In December 1951, the National Association of Band Instrument Manufacturers reported; "Only three factories in our industry have war contracts for materials other than band instruments of any consequence. Approximately 5 percent of the factories have some very small insignificant contracts for minor items, and other members of the industry have no war contracts whatsoever." [2.] Since 1951, a few more war contracts have been contracted, but they still do not represent a large part of the production of the Elkhart firms.

In 1952, the Buescher company was awarded contracts by both the Army and the Navy for the production of 50,000-ft. pressure type altimeters. Other subcontracts have been accepted by that firm. The production of these goods has been conducted in addition to the regular production of band instruments. Additional workers were hired and trained to make the flight instruments. [3.]

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1. R. L. Thompson, Secretary-Treasurer "National Association of Band Instrument Manufacturers," Bulletin #9, December 14, 1951, pp. 1-3. Of the Elkhart manufacturers those not falling in the minimum usage class were The Buescher Band Instrument Company, C. G. Conn Ltd. and The Martin Band Instrument Company.

2. "National Association of Band Instrument Manufacturers," Bulletin #9, op. cit., p. 3.

3. "The Buescher Idea," company publication, The Buescher Band Instrument Company, September 1952, p.2.

As was indicated earlier in this chapter, the employment of C. G. Conn Ltd. and of other Elkhart firms has been decreasing since 1946. Part of this may be traced to the reduction of output caused by the restrictions of materials basic to the industry. Another factor causing reduced employment has been increased foreign competition due to reduced import duties on band instruments since 1948, which will be discussed in Chapter IX.

CHAPTER VIII

THE LABOR SITUATION SINCE WORLD WAR II

The transition to the production of war output and the return to band instrument making after World War I wereresponsible for a significant change in the industry in Elkhart involving organized labor. During the war, high wages were paid and overtime pay was frequently drawn. The painstaking working methods characteristic of band instrument craftsmen were replaced by working methods in which the desire of the workers was to produce as much as possible as quickly as possible with the concern for quality of work being secondary. This attitude of the employees in the Elkhart firms reflected the generally accelerated tempo of production during the war.

With the return to band instrument production labor was affected two ways. Quality was a prime consideration with the band instrument makers. Yet, the budgets of the band instrument firms would not permit the larger percentage of rejected items permitted by the government defense contracts. Also, the production workers desired better representation and a stronger bargaining position with management than they had had before the war. The workers found the answer to this situation by switching from the American Federation of Labor union to the United Auto Workers Union of the C.I.O.

The employees of C. G. Conn Ltd. were the first to make the change over to the C.I.O. Union. On May 15, 1944, the Conn Company entered into an agreement with the United Automobile, Aircraft, and Agricultural Implement

Workers of America, U.A.W.-C.I.O., No. 534. [1] Through this agreement, the union became the exclusive representative of all production and maintenance employees of the company. This included, among others, truck drivers and guards, but not clerical, technical and supervisory employees. This agreement was drawn for the purpose of collective bargaining in respect to rates of pay, hours of employment, and other conditions of employment. This agreement between the workers of the Conn Company and the union served as a model for the other firms in the industry in Elkhart.

Promotional activity by the organizers of the U.A.W.-C.I.O. had an important part in bringing about the change from the A.F. of L. union.

The employees of other Elkhart firms such as the Martin Band Instrument Company, The Pedler Company, Emil H. Blessing Band Instrument Company, and Linton Manufacturing Company, Inc. followed the Conn employees into the C.I.O. Firms not following this example were those in which the size of the firms' labor force did not lend itself to unionization. An exception to the pattern is found in the Buescher Band Instrument Company whose employees have never affiliated with a labor union. This firm has been able to compete on both the instrument market with the union-made products of of the firms with organized employees and also on the local labor market with the union firms. The Buescher firm has paid wages comparable to those paid by the union firms, in Elkhart. In addition, other working conditions - length of the work week and employee benefit programs - of the Buescher firm are comparable to those of the union firms.

One might wonder why musical instrument manufacturers would be affiliated with a United Auto Workers Union. Before this switch, and after

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1. "You and Your Job at Conn," Company publication, C. G. Conn Ltd., 1949, p. 9.

the early A. F. of L. affiliation with the Metal Polishers, Buffers, Platers, Brass Moulders, Brass and Silver Workers Union of North America the band instrument workers belonged to an A. F. of L. toymakers union. This union was a small, national organization located with most of its branches on the East Coast, and whose representatives were not actively in close contact with workers. The U.A.W., on the other hand, has its national headquarters in Detroit, Michigan, a district office in Indianapolis, and for a time operated a regional office in South Bend. Thus, whenever anything of importance arose a representative of the international organization was available. Also, the U.A.W. is a very powerful organization, much larger and stronger than the other union. This enables it to command more respect from management. 1.

Before wartime conversion, job evaluations by which the wage was determined had been based upon the quality of the particular instrument produced. Under the new agreement with the C.I.O. the wage rate was the same regardless of the quality of instrument upon which the labor was applied. A result of this has been that a union firm could not produce a cheap second or third grade of instruments to compete with foreign and non-union producers.

Under the agreement of the U.A.W.-C.I.O. employee-employer relationships have generally been without discord. During the winter of 1946-1947 the workers of C. G. Conn Ltd. engaged in a 15-week strike which arose over a wage dispute and other benefit plans. This was a non-violent strike as no attempt to carry on production was made and activity on the picket line was at a minimum.

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1. The above account explaining the reasons for the change by C. G. Conn Ltd. from the A.F. of L. union to the U.A.W.-C.I.O. union in 1944 has been verified through the following interviews:
E. W. Kucela, Assistant Regional Director, U.A.W.-C.I.O., Indianapolis, Indiana, February 24, 1953.
Charles Strintz, employee of C. G. Conn Ltd., President of the Conn local of the U.A.W.-C.I.O.
R. H. Bressler, Assistant Secretary, C. G. Conn Ltd.
C. T. Boynton, Secretary, C. G. Conn Ltd.

Negotiations were being carried on during the strike by employee representatives, and management. The management conducted a training program for its foremen and supervisors while the production was suspended. The agreement reached, between the international U.A.W.-C.I.O. and the company involved a compromise on the wage increase. As a result of the strike and the settlement agreement personnel changes took place within the company which led to a change in company policy more favorable to the union. After the agreement was reached, production was resumed, and employee-employer relationships again were harmonious.

The ages of the employees in the industry in Elkhart vary from workers of sixteen, the minimum age, to that of Charles Stenberg, who started work for Colonel Conn in 1880, the year he arrived from Sweden. He was steadily employed by the Conn firm until 1952, working alongside his brother, Julius, who began work there in 1887, continuing until his retirement in 1951. Both brothers did hand engraving. Charles "Doc." Stenberg is still connected with the firm in the capacity of a stockholder.

Both men and women are employed in the industry in Elkhart. Most of the workers are white with the exception of a few floor maintenance workers. No one nationality group now predominates and practically all are American citizens. During World War II, the only employee of C. G. Conn Ltd. not an American citizen was its oldest employee, the above-mentioned Charles Stenberg, still a citizen of Sweden. The company obtained a government waiver so that he could remain with the firm which at that time was engaged in highly secret war production.

In any industry a certain degree of mobility of the workers is present. Most of the moving is from one job to another in Elkhart, rather than in and out of the town. Elkhart is located in the South Bend industrial area

so there are opportunities for work in other industries as well as with other instrument manufacturers. The wages paid by the band instrument firms are competitive in the Elkhart skilled labor market. However, many of the highly trained craftsmen, such as engravers, have spent the greater part of their lives learning their trades and are firmly established in their jobs. Approximately 90 percent of the cost of producing band instruments is for skilled labor. The shipping, trucking, plant protection, floor and yard maintenance departments are exceptions to the requirements for skilled labor.

In 1925 C. G. Conn Ltd. had 34 employees who had been with the firm over 30 years. The men which comprised this group represented 1,264 years experience in making musical instruments, an average of 37 years each. [1]

In the same year, 1925, 90 percent of the employees of the company owned stock in it. [2] The profit sharing plan initiated by Charles G. Conn had been continued by Mr. Greenleaf in the years in which profits above those necessary to pay dividends were made. [3] Employees were given the option of receiving cash or shares of stock in the company. Profit sharing during the depression was not possible for the firm due to reduced earnings. Although, the plan was again in operation after the depression and before World War II, it was ended with war conversion. Since reconversion, the contract with the union has made no provision for profit-sharing.

"A survey of Conn employees made in January, 1945, revealed that 17 percent of the 800 employed in 1920 are still at Conn. This 17 percent includes 6 who have been with the company over 50 years (one of them 65 years and two others 58 years); five 45-year men; seven with a record of 40 years; seven who have been employed 35 years; eleven for 30 years; 98 for 25 years; and 186

1. "Musical Truth," June 25, 1925, p.7.
2. "Musical Truth," March 1925, p. 3.
3. Charles G. Conn's profit-sharing plan - see Chap. I.

(179 men and 16 women) who are finishing their 20th year. [1.]

In 1950, 196 craftsmen, men and women, each had 25 years or more continuous service with C. G. Conn Ltd. [2.]

Several years ago, a German family of bassoon makers intended to come over to this country to manufacture their bassoons and then probably enlarge their operations. The immigration bureau sent representatives to the Elkhart factories to find out what the facilities in the country were at the time for the production of bassoons. The representatives of the managements and of the union worked together to convince the immigration authorities that the present bassoon production was sufficient to meet the demands. Thus, the Heckel family was not permitted to immigrate.

Since World War II most of the workers in the band instrument industry in Elkhart have been affiliated with a strong, national union. By belonging to this organization the workers have endeavored to obtain rates of pay, hours of employment and worker benefit programs comparable with those of other industries in Elkhart. Generally, collective bargaining has been employed to gain these conditions. The records of workers employed making band instruments in Elkhart indicated that the turnover of skilled labor is low and that employment in the industry is stable, providing good job opportunities.

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1. "You and Your Job at Conn," Company publication, C. G. Conn Ltd., 1949, pp. 8-9.
2. C. G. Conn Ltd., Catalogue, 1950, p. 3.

CHAPTER IX

IMPORTS, TARIFFS, AND EXPORTS OF BAND INSTRUMENTS

The domestic manufacturers of band instruments are very concerned over reductions in import duties on instruments since 1947. The domestic manufacturers of band instruments have been protected by import duties largely since 1922. Until that year, the tariffs on band instruments had permitted considerable competition by foreign manufacturers. The Fordney-McCumber Tariff of 1922, generally raised duties to a new high level which reduced the ability of producers of imported instruments to compete. The Tariff Act of 1930 followed the pattern of the 1922 act. Since 1951, import duties on band instruments have been based on the Hawley-Smoot Tariff Act of 1930, as amended, and since 1947, have been amended so as to place the domestic manufacturers in more direct competition with importers.

TABLE 4.

UNITED STATES IMPORT DUTIES ON BAND INSTRUMENTS
UNITED STATES TARIFF COMMISSION
1952

	Full Rate [1.]	Reduced Rate [2.]
Brass over $10.00	40% ad valorem	20% ad valorem
Woodwinds	40% ad valorem	15% ad valorem
Cases for musical instruments	50% ad valorem	25% ad valorem

Source: United States Tariff Commission, United States Government Printing Office, Washington, D.C., 1952.

1. Tariff Act 1930, effective June 18, 1930.
2. Reduced rate as of 1951, Torguay Protocol of Accession.

In Table 4. the import duties are shown for brass instruments, woodwinds, and instrument cases. The "full rate" duties listed are those fixed by the Tariff Act of 1930, mentioned above, effective June 18, 1930.

The first trade agreement reducing the tariff on imports of musical instruments and parts into the United States subsequent to the Tariff Act of 1930, was that with France in 1936. This concession granted to France in this agreement became applicable to the other countries producing and exporting woodwinds. The effect of this agreement with France in 1936, through the most favored nation clauses, was to reduce the tariff from 40 percent to 30 percent ad valorem. [1.]

The reaction to this reduction was an increase in imports of woodwind instruments beginning in 1937. Imports of woodwind instruments and parts averaged 16 percent of domestic production during the years 1931 - 1936, but rose to an average of 30 percent during the years 1937-1939, on the basis of quantity of imports. The imports of these goods on a dollar value averaging 5 percent of the domestic production in the first period rose to 17 percent in the latter period. The 1937 - 1939 import level was not reached again until 1948. The dollar quantities of imports for these years are shown in Table 5. [2.]

By 1947, most of the domestic manufacturers of band instruments had reconverted from wartiie production and were competing for the band instrument market. In this year the import duties fixed by the Agreement with France in

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1. "Application for Relief under Section 7 of the Trade Agreement Extension Act of 1951, by:
C. G. Conn Ltd. of Elkhart, Indiana
Frank Holton & Company of Elkhorn, Wisconsin
Penzel, Mueller & Co., Inc. of Long Island City, New York
The Cundy-Bellonay Company, Inc. of Boston, Massachusetts
The Pedler Company of Elkhart, Indiana."
2. Ibid. (For Table 5. see page 66.)

1936 were again changed. The General Agreement on Tariffs and Trade of 1947 was established becoming effective in 1948. The Geneva Agreement, as this agreement is generally referred to, reduced the tariff on imports of musical instruments and parts to 20 percent ad valorem. This is the rate now existing on brass instruments. [1.]

By the Torquay Protocol of Accession of 1951, the woodwind rate was reduced another 5 percent to the current 15 percent ad valorem rate. In this chapter, the situation of the woodwind industry will be analyzed inasmuch as it was more seriously affected by tariff changes than the brass instrument industry. The United States Tariff Commission on August 5-7, 1952 held a hearing in Washington, D.C. at which time the manufacturers of woodwind musical instruments presented their case. Of the five major firms making application on behalf of the domestic producers two were Elkhart firms. Firms importing instruments into the United States also testified.

The report of the domestic manufacturers to the United States Tariff Commission was the "Application for Relief under Section 7 of the Trade Agreement Extension Act of 1951, by:

C. G. Conn Ltd of Elkhart, Indiana
Frank Holton & Company of Elkhorn, Wisconsin
Penzel, Mueller & Co., Inc. of Long Island City, N.Y.
The Cundy-Belloney Co., Inc. of Boston, Massachusetts
The Pedler Company of Elkhart, Indiana"

The instruments with which this application is concerned are classified as

a. Clarinets
b. Saxophones
c. Assembled woodwinds, n.e.c. [2.]
d. Parts for woodwind instruments

all of which are provided for in Section 1541 (a) of the Tariff Act of 1930. As reported, the applicants listed above manufacture approximately 65 percent

1. Ibid.
2. n.e.c. (not elsewhere classified.)

of all domestically produced woodwinds. As such they represent the major producers of the domestic industry in this field. This application is endorsed by fourteen other manufacturers of the domestic industry who, as reported, produce the major part of the remaining 35 percent of the domestic production.[1] Of these fourteen firms endorsing the application, nine are Elkhart firms, and two of the fourteen are subsidiaries of C. G. Conn Ltd., a major applicant listed above.

TABLE 5.

CONSOLIDATED IMPORTS OF WOODWIND INSTRUMENTS
INTO THE UNITED STATES
1931 - 1951
(Selected Years) [2]

Year	Units Imported	Dollar Value
1931	5,346	$ 69,724
1933	3,573	33,408
1935	6,243	80,693
1937	25,166	550,025
1938	32,688	552,913
1939	26,666	524,516
1945	24	7,381
1946	5,800	300,138
1947	15,699	562,689
1948	18,515	882,573
1949	34,251	1,058,362
1950	65,046	1,358,086
1951	64,242	1,933,608

Source: United States Department of Commerce, Bureau of the Census, Washington, D.C., 1952.

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1. In testimony in behalf of the importers of band instruments in favor of continuing present woodwind tariffs, Mr. Jack Feddersen of H. & A. Selmer, Inc. of Elkhart (see p. 33) offered figures to refute the above statement. He contended that Selmer's U.S. production constituted at least 20% of the industry's total. The Selmer firm is a large importer of French instrument parts which it assembles. "Manufacturers, Importers Testify Before U.S. Tariff Commission," The Music Trades, August 1952, p. 27.

2. In this table no information is listed for the years 1940-1944.

In 1951, the absolute increase in imports of these goods over imports of 1947, the year the Geneva Agreement was drawn up, amounted to 409 percent on a basis of quantity and 354 percent on a basis of dollar value, as indicated by Table 5. In 1951, imports of these goods amounted to 135 percent of domestic production; in 1947, imports amounted to 32 percent; and on the average for the years 1937-1939, imports amounted to 30 percent of domestic production.

According to the application, the effects of the tariff reduction have been:

1. Decline in sales of domestic manufacturers: 1951 sales were 44 percent under sales of domestic manufacturers of 1950. Actually, the decline in sales during 1951 would have been even greater if it had not been for the accelerated purchases by the United States Government during the present national emergency. The statistics for the five firms applying are shown in Table 6.

2. Growing inventories:

Inventories of the industry, on an average, were 35 percent higher on December 31, 1951, than on December 31, 1950. Inventories on December 31, 1950 were 25 percent higher than on December 31, 1949.

3. Downward trend in production:

There was a 19 percent decline in the number of woodwinds produced over 1950. The number produced in 1951 was 47,662 woodwinds.

4. Decline in employment:

In 1950, 441 specialists were employed by the industry; in 1939, 827 were employed. [1]

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1. The term "specialists" referred to above was not explained.

5. Price reduction:

In 1951, because of foreign imports, the domestic industry was forced to reduce prices on woodwind instruments from 5 to 10 percent. During this period wages rose. To maintain its position on the domestic market, the domestic industry was forced to:

a. Attempt direct sales to dealers where previously it had dealt through jobbers.

b. Increase by 10 to 15 percent the discount to dealers which then amounted to 50 percent or more.

c. Accept diminished profits, and suffer losses.

During 1950 and 1951, outright losses have been reported by both small and large manufacturers of woodwind instruments.

7. Growth of imports:

In 1931, the domestic manufacture of woodwind instruments and parts supplied 86 percent and imports 14 percent of the instruments sold in the United States. In 1951, domestic manufacture supplied 43 percent and imports 57 percent.

TABLE 6.

COMBINED PRODUCTION AND SALES OF WOODWIND INSTRUMENTS AND PARTS BY THE FIVE APPLICANTS, UNITED STATES, 1947 - 1951

Year	Units Produced	Dollar Value of Sale
1947	31,502	$2,500,269.00
1948	30,400	2,426,010.00
1949	44,592	3,018,699.00
1950	38,465	3,251,138.00
1951	30,987	1,816,333.00

Source: United States Tariff Commission and the applicants.

In presenting their application for relief before the United States Tariff Commission the domestic woodwind producers have attempted to explain

and substantiate by data the harm that has been done to them by the lowered import duties. Another brief was filed before the Tariff Commission on September 8, 1952, in which the domestic woodwind producers testified. Mr. O. J. Thompson, vice-president, The Pedler Company of Elkhart, stated: "We are unable to compete with the imported woodwind instruments regardless of our modern machinery and the efficiency of our employees due to the wide variation in competitive wage rates, the cost of manufacturing, the sales costs, and on the other hand, the low prices of imported woodwinds..." He testified that The Pedler Company operated at a loss in 1951.

Mr. Richard H. Bressler, assistant secretary and export manager of C. G. Conn Ltd., stated: "The woodwind family of instruments, therefore, is not able to stand on its own feet but must be carried along by the profits from the sale of other products."

It was reported that no profits were realized by the Linton Manufacturing Company of Elkhart, which manufactures only bassoons and oboes, under the reduced import duty. It was also reported that the Lisher Bassoon Manufacturing Company of Elkhart and Frank Holton & Company are being forced out of the industry. Referring again to C. G. Conn Ltd., Mr. Bressler reported: "We can either abandon the woodwind section of our business or operate at a loss, neither of which appears to be a satisfactory conclusion."

That fewer American workmen were being employed in making band instruments was again stressed in this later application of the domestic manufacturers. Mr. Thompson of The Pedler Company stated in his testimony: "Irreplaceable workmen...are being displaced as the result of the increasing encroachments of imported woodwind instruments...approximately 95 percent of our employees are skilled in their particular crafts. Approximately 3 to 5

years are required for the training of a skilled worker." (Another manufacturer listed this training period time as from 4 to 6 years.) "...due to the pressure of imported woodwinds on the domestic market we were forced to reduce the number of our employees starting the first of the year 1952, from 51 employees to 29 employees, and to operate on a 32 hour week."

The Linton Manufacturing Company was forced to lay off 50 percent of its workmen in May 1952, when it was substantially underbid by an importer on four large Army contracts. 90 percent of Linton's employees are skilled.

These firms reported that costs of production in the United States were higher than in other woodwind producing countries, and quoted the witness Milton Fink testifying on behalf of the importers as to labor rates in Great Britain who stated that, "...even top piece work wages paid in Great Britain, including all social charges, remain at a level of less than 50 percent of the average maximum wages paid to woodwind workers by the U.S. industry."

From the same brief filed before the United States Tariff Commission on September 8, 1952, the following information was taken:

Production cost in the United States of woodwind musical instruments and parts were from 300 percent to 500 percent higher than the production costs in any other country producing and exporting woodwind musical instruments. The countries listed in Table 7. (see page 71) were selected for comparative purposes because they constitute the major woodwind producing countries of the world. Transposed into U.S. currency, on the basis of the official rates of exchange, the wage scale paid to male labor, from a minimum wage for the highest skilled workmen is as listed in Table 7.

This table shows that the average labor cost per man hour in the domestic woodwind production is from 320 percent to 530 percent higher than in any of the other major woodwind producing countries which export their finished

TABLE 7.

COMPARATIVE WAGE RATES IN MAJOR WOODWIND PRODUCING COUNTRIES,
UNITED STATES TARIFF COMMISSION,
1952

Country	Minimum Wage Per Hour	Maximum Wage Per Hour	Percentage of Wages Paid of Total Labor Costs. 1.	Total Labor Cost Per Man Hour 2.	
				Minimum	Maximum
United States	$1.06	$1.83	113%	$1.19	$2.07
Great Britain	.14	.40	104	.16	.42
France	.27	.44	137	.37	.60
Italy	.17	.23	170	.29	.39
Germany	.34	.56	110	.37	.62
Czechoslovakia	.26	.40	112.9	.29	.45

Source: United States Tariff Commission, United States Government Printing Office, Washington, D.C., 1952.

1. For comparative purposes, the above percentages are transposed into the United States currency on the basis of the wage scales set forth above. They represent the total labor cost (wages plus benefits of every nature) per man to the manufacturer in the countries indicated.

2. The total labor cost per hour to the band instrument manufacturer, that is to say, the actual wages paid plus social security benefits, sickness and health benefits, accident insurance, family allowances, and all other benefits and/or allowances provided the working man by legislative enactments of the respective countries, and payable by the manufacturer, is as listed.

products to the United States.

A return to the 40 percent levy of the 1930 act is being asked for by the domestic manufacturers to provide a balanced competitive market position.

One of the arguments presented by the manufacturers and importers in favor of continuing present woodwind tariffs was that of Mr. Jack Feddersen of H. & A. Selmer, Inc. of Elkhart, a large importer and distributor as well as manufacturer. (See page 33) He stated that the applicants' analysis of foreign labor cost was misleading because only hourly costs were compared. He took the position that total man-hour cost per instrument should be compared. [1].

In upholding the tariff reductions Mr. Feddersen said: "We have shown how our own firm has increased production and sales of domestically built woodwinds, operating under the same competitive conditions as the applicants and with smaller plant facilities than some of them, in the same period during which they allege that sales have suffered due to import competition." [2].

Since the hearing on woodwind musical instruments a field investigation has been conducted by the Tariff Commission to ascertain just how seriously the domestic woodwind industry is being harmed by the reduced tariff. This investigating committee has visited the Elkhart firms which are a party to the application for relif from the lowered import duties. The results of this study have not, as of March 1953, been compiled and no formal recommendation has been made. [3].

1. "Manufacturers, Importers Testify Before U.S. Tariff Commission," The Music Trades, August 1952, p. 38.
2. Loc. cit.
3. Interviews with Richard H. Bressler, Assistant Secretary of C. G. Conn Ltd., November 28, 1952 and March 29, 1953. Mr. Bressler is also export manager for the firm.

In another case, President Truman rejected a request for increased duties by the domestic manufacturers on the basis of the need to encourage trade so as to rehabilitate the industry of European nations. Under the current administration in 1953, in a case involving brier pipes, which was identical in purpose with that of the domestic woodwind manufacturers, an increase in the import duty was denied the domestic manufacturers. [1.]

The position of the band instrument manufacturers in the United States in relation to their exports has changed since the Tariff Agreement with France in 1936. Mr. Bressler of C. G. Conn Ltd. has prepared a report on the exports of that firm and the export trends of the other domestic manufacturers. This information was given in: "Statement of Richard H. Bressler, Assistant Secretary of C. G. Conn Ltd., in support of Application of the American Woodwind Manufacturers for Relief under Section 7 of the Trade Agreements Extension Acts of 1951."

In the year 1936 the exports of C. G. Conn Ltd. to all parts of the world reached a total of $297,558.00, which represented a slight increase over the previous year. The year 1937 showed an increase of approximately 5 percent. A decline of nearly 25 percent of all band instrument exports occurred in 1938. Conn's exports dropped about 20 percent. Then, in 1939, exports were curtailed another 7 percent, and Conn's 12 percent.

This decline was attributed to the outbreak of World War II. By 1940, practically all of Europe and Africa were removed from the market. Then, on June 30, 1942, band instrument production in the United States was curtailed except for military use.

In 1947, after reconversion, exports were resumed and reached an all-time high, even though England, France, Italy, Holland and the countries

1. Loc. cit.

behind the iron curtain had disappeared from the export market. By 1950, Australia, New Zealand, and the Union of South Africa were added to this group. Belgium, Sweden, and Denmark followed. By 1951, practically every country in the world except Canada, Mexico and Venezuela had set up a system had set up a system of import controls, exchange licenses, or both, severely limiting or prohibiting entirely imports of band instruments or even parts thereof.

> A professional musician in England must beg for a set of springs for his saxophone, a professional drummer in South Africa must beg for drum sticks, in order to have the tools of their trade to earn a livelihood. [1.]

The signatory countries to the Geneva Agreement, with the exception of Switzerland, Mexico and Venezuela have enacted either:

a. Outright import restrictions, or

b. financial restrictions, expressed through currency exchange controls or by way of currency manipulations, or

c. both (a) and (b) for the purpose of excluding woodwind instruments produced in the United States. [2.]

From these reports it is seen that makers of band instruments in the United States have more limited markets and stronger competition as the result of two factors: Import duties on foreign made instruments entering the United States have been lowered, and trade barriers have been set up severely restricting U.S. exports.

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1. I read the letters, now in the personal file of Richard H. Bressler, which musicians from all over the world have written to Mr. Bressler eagerly seeking an arrangement whereby they might buy American band instruments and parts The paragraph quoted above makes reference to several cases mentioned in these letters.

2. Before the United States Tariff Commission: "Application for Relief under Section 7 of the Trade Agreement Extension Act of 1951, by:
C. G. Conn Ltd. of Elkhart, Indiana
Frank Holton & Co. of Elkhorn, Wisconsin
Penzel, Mueller & Co., Inc. of Long Island City, New York
The Cundy-Belloney Co., Inc. of Boston, Massachusetts
The Pedler Company of Elkhart, Indiana

CHAPTER X.

THE ELKHART BAND INSTRUMENT INDUSTRY IN 1953

The band instrument industry in the United States is small, but highly specialized. Although no figures are available for firms manufacturing band instruments only, there were in the United States in 1947, 169 firms engaged in the manufacture of musical instruments and parts. (See Table 8.) In addition to band instruments, this classification included stringed instruments, accordions, and musical toys. The 169 firms employed an average of 5,365 employees for the year of which 4,585 were production workers. The total value added by the manufacture of those firms was $22,122,000. These figures are presented in Table 8. which gives comparable figures for selected years from 1899.

It may be noted that during the depression years 1931, 1933, 1935, and 1937, listed in the table, both the number of firms in the industry and the number of workers employed were reduced. However, during these years none of the Elkhart band instrument firms were forced from the industry. The value added by manufacture in those years reflected the decline in employment. The value added by manufacture of $10,449,000 attained in 1929, was not reached again until after World War II in 1947. That the W. T. Armstrong Company entered the industry in 1932, and the Artley Manufacturing Company entered in 1939, seems to substantiate the conclusion that market opportunities were available to the band instrument firms even during depression years.

TABLE 8.

MANUFACTURE OF MUSICAL INSTRUMENTS, n.e.c. [1.]
UNITED STATES
(Selected Years)

Year	No. of Manufacturing Establishments	No. Av. All Employees For Year	Prod. & Rel. Workers, No. Av. for Year	Value Added By Mfg. *
1947	169	5,365	4,585	$22,122
1939	101	4,104	3,191	8,108
1937	83	4,096	3,409	8,142
1935	94	3,519	2,864	6,295
1933	72	2,504	2,064	3,490
1931	88	N.A. [2.]	2,593	5,876
1929	106	3,931	3,176	10,449
1927	99	4,718	4,018	13,251
1925	100	5,171	4,556	14,754
1923	106	4,721	4,103	11,270
1921	116	3,945	3,424	9,029
1919	240	4,734	4,113	8,061
1914	241	2,176	1,831	2,602
1909	187	2,082	1,822	2,398
1904	181	2,364	2,139	2,352
1899	229	2,563	2,405	2,190

Source: Census of Manufacturers, Vol. II, p. 799, Statistics by Industry, 1947. U.S. Department of Commerce, Bureau of Census, U.S. Gov't. Printing Office, Washington, D.C., 1949.

* In thousands.

1. n.e.c. (not elsewhere classified). This industry comprises establishments primarily engaged in manufacturing all kinds of musical instruments, parts, and materials except pianos, organs, and piano and organ parts and materials.

2. N.A. (not available).

Of the 169 firms producing "musical instruments, n.e.c." in 1947, as reported by the Bureau of the Census, 19 were located in Indiana. The Indiana firms employed 28.2 percent of the average number of all employees for the year and accounted for 28.6 percent of the value added by manufacture by all the firms. Table 9. presents the geographical distribution of the manufacture of "musical instruments, n.e.c."

Since 1946, 15 band instrument firms have been operating in Elkhart. Eleven of these firms are independently owned and operated while four are subsidiaries. In addition, five firms in Elkhart manufacture band instrument parts or ca ses. Thus it appears that practically all of the manufacture of "musical instruments, n.e.c." in Indiana in 1947 was devoted to the production of band instruments and band instrument parts and was conducted in Elkhart. It appears, moreover, that of the manufacture of band instruments in the United States, the value added by manufacture in Indiana would be considerably above the previously stated 28.6 percent of the total which was based on band instruments plus stringed instruments, accordions, musical toys, and other instruments included in the classification.

Approximate sizes of firms engaged in the production of "musical instruments, n.e.c." is presented in Table 10. The single firm in the industry employing over 500 workers produced 22.9 percent of total value added by manufacture and employed 25.1 percent of all employees. Moody's Investor's Service reported that on December 31, 1947 C. G. Conn Ltd. of Elkhart employed 1,305 persons. [1] It is apparent therefore that the firm to which this classification referred was C. G. Conn Ltd.

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1. Moody's Analysis of Investments - Industrial Securities (New York: Moody's Investor's Service, 1948). p.

TABLE 9.

MANUFACTURE OF MUSICAL INSTRUMENTS, n.e.c., BY GEOGRAPHICAL LOCATION
UNITED STATES
1947

	Number Estab.	All Employ. No. Av. Yr.	Prod.& Rel.Workers		Value Added By Mfg.
			No. Av.	Man Hr.[1]	
Total	169	5,365	4,585	9,414	$22,122
New England	13	270	237	509	1,077
Mass.	8	222	195	426	896
Mid.Atlantic	61	1,269	1,092	2,224	6,008
New York	43	547	454	989	2,678
N.Central	80	3,495	2,953	6,053	13,771
Indiana	19	1,515	1,209	2,410	6,318
South & West	15	331	303	628	1,266

Source: Census of Manufacturers, Vol. III, Statistics by States, 1947, p. 204. U.S. Department of Commerce, Bureau of Census, U.S. Government Printing Office, Washington, D.C., 1949.

1. Man hours are expressed in thousands.

TABLE 10.

MANUFACTURERS OF MUSICAL INSTRUMENTS, n.e.c.
CLASSIFICATION OF FIRM SIZE BY NUMBER OF EMPLOYEES
UNITED STATES
1947

	Total	1-4	5-9	10-19	20-49	50-100	101-249	250-499	.500
No. Establishments	169	58	28	24	31	16	9	2	1
All employees	5,365	138	181	343	920	1,125	1,310	d.	1,348
Prod. Workers	4,585	135	175	297	805	974	1,146	d.	1,053
Prod. workers man hours (000's)	9,414	261	347	618	1,728	2,089	2,310	d.	2,061
Value added by manufacture (thousands)	22,122	479	673	1,494	3,681	5,375	5,359	d.	5,070

Source: Census of Manufacturers, Vol. I, General Statistics for establishments classified as to size by number of employees, for major industry groups and industries, 1947, p. 139. U.S. Department of Commerce, Bureau of Census, U.S. Government Printing Office, Washington, D.C., 1949.

d. Withheld to avoid disclosing figures for individual companies.

The distribution of the value added by manufacture among the families of instruments and among the particular instruments for the United States may be seen from the following: [1.]

Value added by Manufacture of Musical Instruments and Parts, n.e.c. (see Table 2.)	$2,107,748
Cup mouthpiece instruments	2,727,120
Cornets and Trumpets (48,175)	1,427,639
Trombones (15,596)	504,856
Others (39,129)	854,625
Saxophones (15,697)	842,976
Clarinets (52,573)	1,156,591
Other wind instruments (13,917)	289,371
Percussion Instruments (72,109)	1,468,858
Drums (52,391)	826,027
Others: bells, chimes, xylophones, etc. (19,718)	642,831

[1.] Census of Manufacturers, Vol. II, Pt. 2., 1940, p. 581. U.S. Dept. of Commerce, Bureau of Census, U.S. Government Printing Office, Washington, D.C., 1942. This breakdown of musical instruments and families of instruments has not been available since this report published in 1942.

From this study of the band instrument industry in Elkhart several factors stand out. The industry was first established there, as indicated in Chapter I, because of a historical accident. However, because of the nature of the industry it could have been established in many other towns or cities throughout the country and prospered. Basic requirements for manufacturing are present in Elkhart, but not in that city exclusively. The raw materials required, as discussed in Chapter V, are such that they can be brought to the place where they will be made into the finished product without prohibitive cost even though some must be obtained from distant areas. The finished products, as well, relatively small and light for dollar value, can be shipped from the factories in Elkhart to the individual market areas without excessive cost.

The factor in the industry that has stimulated centralization and which has permitted Elkhart to continue as a band instrument center is skilled labor which represents approximately 90% of the cost of the finished product. Charles G. Conn was responsible for bringing to Elkhart the first craftsmen skilled in band instrument making. Through a journeyman system workers were trained in the Elkhart plants as other trained craftsmen continued to join the firms. The total population of Elkhart in the 1950 census was slightly over 37,800. Of this number approximately 1,500 to 2,000 were employed by the band instrument firms.

In relation to the total working force in Elkhart in 1953, the employment of workers by the band instrument firms is important. But the band instrument industry is only one of a number of industries represented in Elkhart. Among other manufacturing firms in Elkhart are foundries, tool and die makers, metal forming concerns, house trailer manufacturers,

pharmaceutical producers, and others. In spite of the numerous other industries and firms represented in Elkhart, the city is still most frequently associated with band instruments. That this is true is the result of the years of promotional activity on the part of men such as Charles G. Conn and James Boyer, who strove to make Elkhart, and in their case Conn, synonymous with band instruments in the minds of bandmen: players, directors, and teachers. The reputation built for Elkhart through its association with the band instrument industry served not only to focus attention on Elkhart among band men and to develop markets for Elkhart made instruments, but it was also an incentive for skilled craftsmen to settle in Elkhart and add their contribution to the industry. As other firms entered the industry in Elkhart they, too, acted to direct attention in the band world upon Elkhart, and in turn upon their firms which benefited from this promotional activity. Thus, the location of skilled labor in Elkhart and the intense promotional activity by the firms have, together, been responsible for the success of the industry in Elkhart.

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INTERVIEWS:

Interviews which are reported in the footnotes of the thesis have been conducted with the following:

C. T. Boynton, Secretary, C. G. Conn Ltd., Elkhart, Indiana.

R. H. Bressler, Assistant Secretary, C. G. Conn Ltd. and Export Manager, Elkhart, Indiana.

G. H. Way, Leedy and Ludwig Drums, Div. of C. G. Conn Ltd., Elkhart, Indiana.

E. J. Kucela, Assistant Regional Director, U.A.W.-C.I.O., Indianapolis, Indiana.

C. W. Strintz, President, Conn C.I.O.-U.A.W. Union, Elkhart, Indiana.

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