

Behavioural Study on Arts Participants

Focus Group Study – Full Report

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Hong Kong Arts Development Council

GAME CHANGERS



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BACKGROUND AND SET-UP



Research Objectives

In view of the changing arts market landscape in Hong Kong, partly due to the impact of COVID-19, the HKADC conducted a qualitative study to gain deeper understanding on audience's arts participation and potential ways to further engage them.

Thus, the research aims at providing insights on:

Audience's relationship with different art forms

- Exposure to art forms (e.g. genre, show partners, behaviour change pre vs. post-COVID-19)
- Initial trigger points of participation

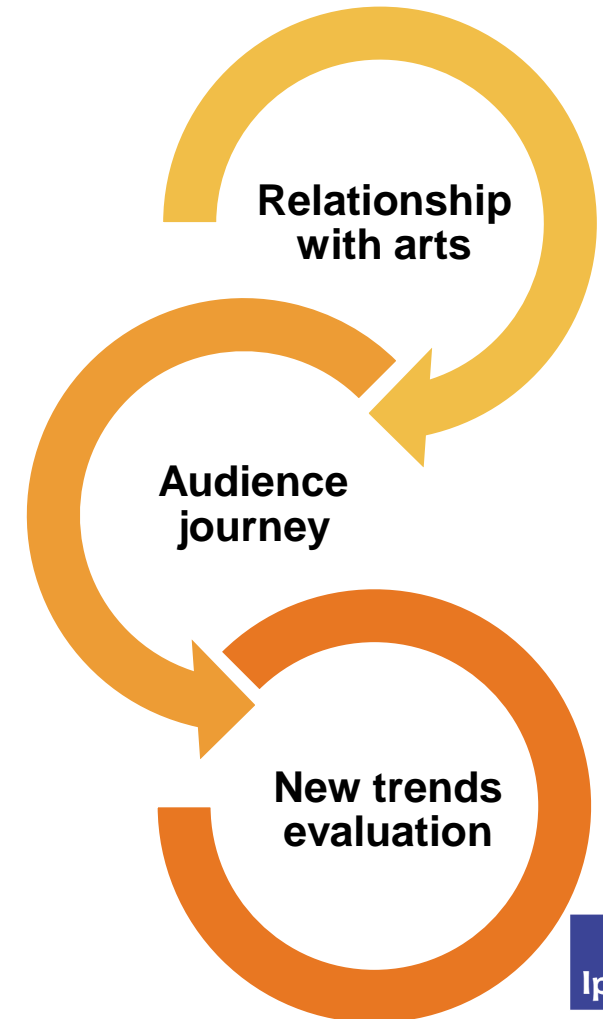
Audience journey

- Triggers and barriers to attending performing arts and visual arts activities
 - Variation between different genres
- Discovery channels (online + offline) and any unmet needs
- Promotion tactics
 - Likes and dislikes of the major promotion materials – posters*
- Post-show engagement

New trends evaluation

- Awareness and impact of an array of new approaches (e.g. art tech, cross-category collaboration, novel topics, etc.)
- Public perception of art development direction for Hong Kong, with a focus on opportunities for medium to small art groups

* The photos of posters / leaflets presented in the "Poster design" sections of the reports were mostly taken / collected by the HKADC research team and Ipsos from various performing venues / public space in Hong Kong between June and August 2022, and were used as visual aids in the focus group interviews, while a few were posters of shows mentioned by respondents.



Focus Group Design

Methodology	Length of interview	No. of groups & respondents	Fieldwork period	Format
Focus Group	2 hours per group	10 groups, each with 6 participants	18 th Jul – 13 th Sept, 2022	Face-to-face

Based on the fieldwork period, timeframe commonly used throughout the report is defined as below –

- “Past 1 year (P1Y)” refers to the period between Jul 2021 – Jun 2022 (except for the Visual Art section: P1Y refers to Sept 2021 – Aug 2022);
- “Pre-COVID-19” refers to time before Jan 2020.

Art Form	Number of Focus Groups	Group composition	Segment definition
Theatre	2	Active & Lapsed participants Age of 25-44	<ul style="list-style-type: none"> • Active participants: have participated / booked tickets for activities of the respective art form for at least 2 times from Jul 2021 to Jun 2022 in Hong Kong • Lapsed participants: had participated in arts events before Jan 2020 and ceased afterwards as of the fieldwork period
Music	2		
Dance	2		
Xiqu	2	Active & Lapsed participants Age of 41-60	<ul style="list-style-type: none"> • Active participants: have participated in >8 exhibitions (with 2+ paid events) from Sept 2021 to Aug 2022 in Hong Kong • Less active participants: participated in 2 – 7 exhibitions in the said period • Lapsed participants: had participated in arts events before Jan 2020 and ceased afterwards as of the fieldwork period
Family-friendly Arts	1	Active participants Age of 25-44, all with children aged below 14	
Visual Arts	1	Mix of Active/ Less Active & Lapsed participants Age of 25-44	

INTRODUCTION



Arts education, arts exposure and peer influence trigger arts participation. COVID-19 reduces competition from foreign arts groups and brings opportunities to local arts groups.

Initial engagement

More educated
and open-minded
art participants

- **Education is a major gateway for public to cultivate an interest in art.** Early exposure to performing arts/ visual arts in secondary school and universities normalise regular participation and build the foundation for art appreciation.
- **International art experience also opens the mind of participants**, especially in visual arts.
- Those with relatively little exposure in arts at a young age are more attracted by arts events of which they can find elements of familiarity (e.g. performers, topics). Friends and peers also play critical roles in encouraging their continuous participation via knowledge sharing.

Growing interest
to support local
artists

- Before COVID-19, **high-profile shows/ world-class performers** were key factors that attracted new participants with little knowledge in arts into the art scene.
- **After COVID-19, audience has shifted to see more local shows and exhibitions.** As after the reopening of performing and exhibition venues, some audience who was less interested in local arts events before COVID-19 has paid more attention to local arts scene due to limited availability of foreign arts shows in Hong Kong.

Live arts shows and exhibitions provide a sense of presence and engagement that cannot be found in online arts events.

The appeal of attending arts events in person

Sense of presence
現場感

- **Live performance is the key differentiation** that sets performing arts apart from other popular forms of entertainment (e.g. movies). Each live performance is unique.
- Small space and dense living condition in Hong Kong do not allow most people to have a full **immersive** art experience at home. The ambience of a theatre cannot be duplicated.
- Both novice and arts enthusiasts find live performance provides better **richness** than what a screen and a sound system can provide.

Sense of engagement
投入感

- **High quality performers and excellent stage effect** are the key contributors to a sense of engagement. Audience find that local art groups are able to deliver high quality performance; new visual art venues like M+ also provide better exhibition space that fuels engagement.
- Local art production, in both performing arts and visual arts, involves **topics and artists that people in Hong Kong are more familiar with**, giving them a sense of relevance.
- Increasing number of performance/ exhibition use **interactive and immersive techniques** that connect audience and performers/ artists to make a show experience engaging and distinctive.

The market is ready; the arts are appealing. What we need is to convince by conveying the value and engage with continuity.

Communication

Justify price and time spent

- **Audience are willing to spend given that they have good confidence that they would enjoy** the performance/ exhibition. Thus, events involving well-known artists and good reputation tend to have very high demand, despite relatively high price tag.
- Audience of different art experience and different art forms looks for different cues that convey worthiness. In other words, the list of consideration factors are different.
- Performers/ Artists and topics are usually the two most important factors. Poster plays an important role in giving a sense on what to expect.
- When there is a lack of attractive triggers, convenience is a key consideration factor for art participants. An inconvenient venue is a very strong barrier, especially for novice.

Stay in the loop or even top-of-mind

- **Publicity is an interest driver.** A talk-of-the-town performance or exhibition naturally brings interest and desire to participate.
- Lapsed audience often rely on social media for arts event information. However, as social media algorithms changed during COVID-19, visibility of arts activities on social media has reduced.
- Post-show engagement is also uncommon, except for the enthusiasts. Art groups need to think about ways to continue engagement even when there is no upcoming performance.

The richness in big-budget drama and musical appeals to even the least trained audience. Clear communication on what to expect attracts interest.

Theatre

<p>Key findings</p>	<ul style="list-style-type: none"> • Relevant topics incite interests. While niche topics are differentiating, audience may find it hard to predict what to happen in the performance. • Popular actors/actresses create wide reach and strong appeal, but the majority of novice or occasional audience are not very familiar with local theatre groups, actors and less common genres (e.g. black box theatre). • Audience look for information to predict satisfaction. Communication focusing on ticketing information and storyline may not be sufficient to make value judgement.
<p>Recommendations</p>	<ul style="list-style-type: none"> • Clearly communicate the positioning of a performance during the promotional stage (e.g. whether it is meant to be reflective or amusing) to appeal to the targeted audience and manage audience expectation. • Small local production needs to convey quality assurance via different means, including generating WOM, content creation on social media and featuring 1-2 reputable cast to leverage their fame for promotion. • To assure novice participants who hesitate to enter the theatre, long show period, which often requires well-known stars to sustain interest and public attention, could help convince novice participants by allowing enough time to generate WOM. • Posters should be designed with reference on elements that convey quality assurance. Aesthetics of posters are important especially to less active audience. • Show clips or photos of previews, making-of, rehearsals or previous performance recordings to help visualise what to expect. • In addition to pre-show promotion via theatre groups, actors and playwrights, post-show engagement and regular updates are critical to keep communication in the loop on social media algorithms.

Long-term music audience have developed a personal musical taste and thus show limited interests in other genres of music, while new participants are more open to exploring different genres.

Music

<p>Key findings</p>	<ul style="list-style-type: none"> • Big names (at the level of performer or composer) attract attention and interest, particularly among audience of classical music/orchestra. Many respondents expressed a longing for the comeback of famous international performers of ultra-high recognition, which is less likely to be found among local performers. • Subject to genre, performer-audience interaction takes different forms. However, such interaction is still important to set the experience apart from listening to recordings. • Current communications focus on ticketing information and lack human touch to engage novice or less knowledgeable participants. • Many treasure the “purest” art appreciation experience and enjoy participating in performance with familiar pieces. Innovation is good to have but stronger communication on what to expect is needed. • Experienced audience associate specific venues with sound effects and concert quality.
<p>Recommendations</p>	<ul style="list-style-type: none"> • Behind the halo of “big names”, audience are aspired to performers who demonstrate excellence in techniques, teamwork and ability to illustrate music pieces nicely. Local groups shall seek means to communicate strengths beyond CV and increase publicity by doing mini-shows at public and making online trailers. • Popular music themes lower the bar for appreciation and attract less sophisticated audience given good confidence on the performers. These audience are also more interested in a new kind of musical experience, including outdoor performance, fusion with popular artists and other arts forms. • New venues such as WKCD open space provide a relaxing atmosphere for music enjoyment. As jazz concerts are more interactive, there is potential for them to take place on alternative performing venues.

Contagious emotion expression via body movements is the key appeal to trigger attendance. Dance participants pay more attention to aesthetics of dance performances and poster designs than other art form participants.

Dance

Key findings	<ul style="list-style-type: none">• Ballet has a long history in owning the festive December schedule, and it is effective to trigger recalls and participation. However, other dance genres find more challenge in staying top-of-mind to the audience, especially after COVID-19 as the lapse in performance information has impacted social media algorithms.• Audience recognise dance groups but seldom individual dancers, thus difficult to engage on social media. Awareness on performance heavily relies on word-of-mouth.• Audience look for posters that give out clear vibes (e.g. modern/edgy/aesthetic). It sets expectation on the quality of expression.• Yet, the concept of beauty is abstract – novices find it hard to predict what to happen in the performance to evaluate their likeliness to enjoy the experience.• Engagement has to be built by high-quality performers and a good usage of stage.
Recommendations	<ul style="list-style-type: none">• Aesthetics of poster (as mentioned above) should be at the top of the list in promotion, since dance participants take the aesthetic aspect of posters into consideration more than other art form participants.• Demonstration on strong teamwork, versatile body movement and stage set-up shall be communicated during both promotion and performance.• Make better use of social media, arts and ticketing platforms, bloggers and critics to disseminate information on performance. Show clips or photos of previews, making-of, rehearsals or previous performance recordings, or even use mini-shows to help visualise what to expect.• Bring dancers to spotlight to give more personal touch and engage with the audience to get continuous support on both social media communication and performance attendance.

Progress of recruiting new audience is slow. The younger generations grow up in an environment without knowledge nor a culture of Xiqu appreciation.

Xiqu

Key findings	<ul style="list-style-type: none">• As observed by the focus group respondents, younger generations find Xiqu old-fashioned. Many do not want to publicly announce their interest nor recommend it to others.• Audience show hesitation to accept new things, including green performers and new plays, as many expect to have challenge in fully understanding the new scripts.• Art-tech is an exception. Respondents look forward to the trendy element bringing in more young audience. They also trust with upgraded lighting and sound systems in new venues, the presentation shall be engaging and amazing.• Some venues (WKCD and Ko Shan Theatre) are often not easily accessible by public transportation, and thus less appealing to audience.
Recommendations	<ul style="list-style-type: none">• Appeal to the younger generation by collaborating with pop stars and using art-tech.• Showcase the different facets of Xiqu (excellent integration of traditional acting, singing, dancing and martial arts, sophisticated craftsmanship in costumes, richness in culture, literature and history) to attract audience who may be interested in different aspects of Xiqu.• As many messages in Xiqu are indirectly communicated and the scripts are often not easy to understand for new participants, providing detailed show information or even guidance in the form of pre-show seminars could enhance audience's appreciation of Xiqu.• New scripts can be attractive if they are able to communicate quality and professional image (via performers, stage setting, traditional costumes and a resonating story with rich historical context).• To drive ticket sales and encourage participation, consider cross-art-form/cross-venue/cross-performing-group bundled tickets.

Parents' preference for shows change as their children grow up. Arts events are perceived as expensive leisure activities that provide unique educational experiences and sow the seeds of interest in arts.

Family-friendly Arts

Key findings	<ul style="list-style-type: none">• Topics relevant to small children, such as fairy tales, animals and kids' movies, are particularly attractive to the audience. Education value beyond entertainment is highly appreciated, and they can happen in the form of pre-show workshops.• Attention span of children can be short - it is easy for them to lose attention and the ability to engage. Small kids are also easy to be frightened by various stage settings such as darkness, fire and dogs.• Word-of-mouth is the key to information dissemination and trigger of interest. As their children grow up, parents move onto programs suitable for their children's age.• Venues with food options and kids' facilities are more popular. Show dates during examination periods are less preferred.
Recommendations	<ul style="list-style-type: none">• Plan carefully a fine balance of many elements, including performer-audience interaction, atmosphere control, performance duration, the breadth of performance (music, dance, storyline, stage design, etc.), the understandability of story vs the depth of message, etc.• Poster shall clearly communicate suitable age, selling points such as interactive elements and educational topics using colourful illustration.• Promotion on online platforms for parents has been effective.• The use of popular local stars has more impact on the parents' than kids' experience on enjoying the performance but it still works effectively in raising attention and interest.

Audience feel a general lack of support to help them learn about local artists and exhibitions. Instagram-able exhibition boosts attendance but not interest in artists.

Visual Arts

Key findings	<ul style="list-style-type: none">• Many are selective even for free events – they evaluate the expected level of enjoyment for the whole journey against the effort made. Many consideration factors are not related to arts itself, but other factors such as commuting time, nearby facilities.• There is a particular low level of engagement with local artists, unfamiliar visual art mediums (e.g. Chinese painting & calligraphy) and art galleries.• Except for the very involved participants and events with strong social media buzz, there is a general low awareness on events at different venues.• Arts-tech is most well-received among Visual Arts audience. While immersive installations are considered most attractive, VR and online exhibitions are less popular.
Recommendations	<ul style="list-style-type: none">• Promotion shall include information such as the scale of exhibition to help audience make informed decision and manage expectation. Encourage collaboration among venues and artists to create synergy and enrich the experience of one visit.• Local artists could garner support by communicating their own background in an engaging and accessible way (e.g. short video clips at the exhibitions). Moreover, sizeable and themed exhibition is an alternative to draw attention apart from big names. Many participants find local-related topics resonating.• Encourage interaction of curators or artists with the audience to enhance audience’s sense of engagement.• Celebrating the success of local artists not only helps them gain recognition and publicity, but also helps gain parental support in arts education and encourage children to participate in arts at an early age.• Education is important to cultivating appreciation on visual arts – especially the techniques in art creation, history and evolution of different art styles, as well as early exposure to a wide range of different art forms.