MUSIC

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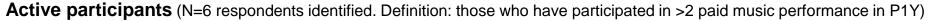




Sophisticated participants tend to target specific music genres while those with less experience are happy to explore different genres and concerts.

Genres participation

Mainstream	Occasional participation	Low participation		
Orchestra	 Jazz Chinese orchestra Choir / A Capella Strings quartet / Chamber 	Solo performanceVocal musicOpera		



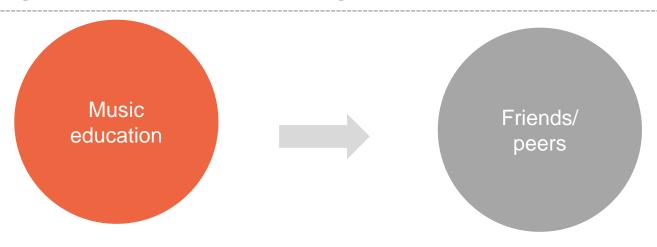
- Majority are orchestra audience, who were substantially impacted by music education in early years.
- Since music is an integral part of their lives, participation continues during COVID-19, despite a slight drop in frequency. When shows by foreign performers are suspended, most are willing to try local musician groups.
- Music performance audience are more comfortable with **sole participation** Many have distinctive music tastes. While interest in music genres is not mutually exclusive, they tend to stick to one genre.
- Musical performance is a **multi-sensory enjoyment** it is more than the auditory aspect. Participants also enjoy the visual enjoyment on the musicians' gestures and the demonstration of teamwork (particularly in orchestra).



- Majority see attending music performances as a social gathering. These participants find orchestra performance
 good for value, because a big crew is performing for them as compared with other music genres.
- The tendency to attend with peers hold back their return to live musical performance as friends may not be ready
 to resume arts participation even if COVID-19 restrictions are lifted. They need strong cues, e.g. renowned
 musician groups/ popular song list, that may generate interest among less enthusiastic arts participants.



At schooling stage, music education provides a foundation for appreciation. High-profile performance effectively triggers interest into making the first trial among adult audience.



- Affected by education policy, pupils are encouraged to learn one instrument
 - 9 learners are observed (6 Active participants + 3 lapsed participants)
- Few respondents have experience in choir and Acapella
- → Relatively high prevalence at schooling stage

 As learning music is relatively prevalent at schooling stage, some non-learners could be enlightened by learner friends. However, such entry is less common as compared to other art forms.



"I don't play instrument myself. My schoolmates gave me a Jazz CD and I craved Jazz ever since. After that, I kept buying student tickets to music shows and festivals."

Lapsed music participant



 Big news in the music industry might tap into part of the general public if it features world-famous performers (e.g. Joe Hisaishi, Lang Lang), debut in Hong Kong or local artist (e.g. Hins Cheung cross-over with Hong Kong Chinese Orchestra)



Performer is the key criterion. Overseas performers have strong fame that cues expertise and capability to deliver a good show.

Performer

Big name is a **standout factor** in performance selection as fame is a clear indication of the performer's mastery.

Classical / Orchestra

- Performers could be categorised as local and overseas, while most big names respondents recall are from overseas.
- No respondent rejects local musicians, but the fame of foreign musicians is simply too strong to make them more favourable.
- As classical music faces a wide spectrum of audience, "big names" could be interpreted differently –

Examples of figures well-known among public





"If Lang Lang comes, I can easily ask friends to go with me because everyone knows him."

Lapsed music participant





"There is someone out there, even if you are not a music fan but you have heard of him, such as Joe Hisaishi."

Lapsed music participant

Examples of figures/ groups well-known among fans





"If Jaap van Zweden could come to Hong Kong, I would go because I prefer big names."

Active music participant





"If Andris Nelsons with the Boston Symphony Orchestra visit Hong Kong again, I will definitely go."

Active music participant

Jazz

- Reliance on musicians' line-up and combination is very strong
- Few mentions a preference of black musicians in Jazz music – audience search for authentic experience that local groups may not be able to offer.



To audience who have their own "music taste", they pay attention to the selection of songs. Above-standard and accessible venues could create further push.

Song list

Orchestra:

- Across groups, respondents love performance that is astounding and rhythmic. Classical pieces have some fans support, with few being featured repeatedly and started to bore (e.g. Bach & Beethoven)
- Thematic performance with popular songs (e.g. Star Wars & Totoro) draw some appeal but they have to match with the remaining songs on the list.

Jazz:

 Song list is barely a consideration factor as performance is usually spontaneous.

Venue

Venue means more than accessibility. It also implies good equipment and overall show experience

- Remote venues: Examples include Siu Sai Wan Civic Centre and Yuen Long Theatre. Remote venues plus weekday evenings lead to time rush and hassle, thus generally less preferred.
 - An exception would be very attractive/ rare shows, such as featuring famous foreign performers. Participants are willing to make extra effort.
- New venues: Most respondents are aware of WKCD and consider it to be a relaxing and chilled place for music performance, despite some scepticism on sound effect.

Fond of classical pieces



"To many people, Mozart's music could put them to sleep. But as a piano learner, I can indulge in his music."

Lapsed music participant

Less interested to classical pieces



"I would skip Bach or Mozart. There are simply too many of these kinds of shows. I want something special, like a Star Wars concert."

Active music participant

"The feeling is totally different as the show takes place in different venues. If it is in a venue less high-end, such as Yuen Long, you pre-empted this won't be a good show."

Lapsed music participant



"If a renowned performer comes to Hong Kong, I will buy the ticket as early as possible, 3 months or even a year ahead. Venue doesn't matter."



Audience have been passive in receiving updates. Current communication focuses on performance updates, but lacks human touch.

A handful of respondents receive performing groups' updates randomly (i.e. wait for the advertisement to reach them). Vast majority prefer online promotion.

Mass-facing Niche

Online channels	ULifestyle Lifestyle page	LCSD webpage	Performing groups' social media	Performing groups' email newsletter	Performers' social media	Underground organisers' page (Jazz specific)	Word-of-mouth
Active	✓	✓	②	\	\	⊘	•
Lapsed	•		Ø	⊘		Ø	*







Performing groups need an icon to be distinguishable and attention-catching, as agreed across groups



"I am more enticed to learn more about a musician if he/she can share personal life, have a mini performance on KOL channels and talk about upcoming plans."

Lapsed music participant

Potential touchpoint

Information hub for small-medium performing groups

- Hurdles set for the groups: 1) Less exposure, hence fewer occasions to establish ties with audience; 2)
 Consequently constrain access to their updates
- → Gather all information/updates from small-medium groups so the hub becomes a gateway/ go-to destination for field update
- → When engaging with followers, watch out for post content/frequency and copywriting style to avoid information influx



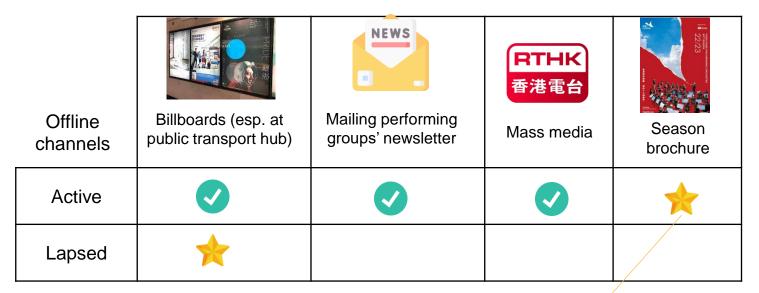
"Can public sector provide funding or start a platform for these groups? Large groups can manage their own page well, but more attention shall be given to smaller ones."

Lapsed music participant



Active participants review season brochures to avoid missing out. Lapsed participants have low engagement via offline channels.

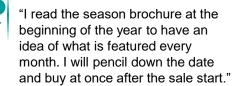
Mass-facing





- Season brochure help active participants to mark their calendars and is helpful particularly if they have planned to purchase tickets via early bird
- More than half of active participants have bought early bird tickets, with the earliest one being 1 year in advance
- Also released by performing groups, poster has a lower impact as audience nowadays do not find them handy and informative

- Important information channel
- Information channel mentioned



Active music participant

Niche

Potential touchpoint



Venue newsletter

- The publication includes all events that take place in the venue, regardless of the scale of organisers, thus small-medium groups stand an equal chance to be seen
- It targets the right segment as public who subscribe to the publication already have some interest in culture and arts



Audience's expectation of poster content is simple – performer, instrument and any selling points. Colour and layout are key to delivering premiumness.

Selling point

Featuring subject



Performer + instrument

"The poster needs to highlight what I am going to watch (the performer and the instrument)."

M, 34 y.o.



Merit

"Award such as Best Music in Oscar needs to be called out"



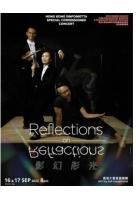
Ambience



Grand

"The tune is dark on this poster. And the silver boundary makes it feel grand."

F, 37 y.o.





Cartoon

"Cartoon is for those who watch with kids, not for me"

F, 39 y.o.





Context

"Dunhuang (敦煌) is connected with China and history. Using a keyword that is well-known allows me and my friends to understand the theme."



M, 26 y.o.



Irrelevant to music

"Celebration of reunification (賀回歸) is not related to music."

M, 26 y.o.





Unmatching positive energy

"It's like a performance to advocate anti-drug, too much positive energy, doesn't feel jazzy."

M, 35 y.o.





Being in a music performance is a sensorial enjoyment. Consider methods to reinforce immersive ambience and differentiate performance from others.

Ambience

 Perception of ambience could be very subjective and personal, but remarkable experience leave strong memory points to audience and trigger continuous support.



"I still recall an impressive show experience a few years ago. I don't know the songs, but the immersive ambience is still lingering in my head."

Lapsed music participant

- Unlike other art forms which require logical thinking to comprehend the plot/ meaning, music audience prefer to clear their mind, listen to music and allow emotions to flow with the rhythm.
- Less sophisticated audience tend to seek rhythmic and flowing music pieces that are good for relaxation.
- Audience have little experience on Chinese and fusion music and are unsure about their harmonic experience
- For Jazz, audience seeks a cool image at promotion while an intimate experience with performers at shows.

Performance quality

 General audience set basic criteria for "music performance" – no off-pitches, minimal mistakes in show arrangement/ logistics



"Taking eating as an example, tasty food won't leave a memory point. But if you ever had nasty food, you would be really irritated and tell the world about it."

Lapsed music participant

- As teamwork is the DNA of orchestra music, some also look at interactions between stage performers
- Without evident cues, some believe foreign performing groups could deliver higher music quality
- Art groups shall highlight the cues on how they strive to play good music as a team. It could be in the format of clips depicting behind-the-scene/ rehearsal and reviews from reputable figures

Differentiation

- To many novice or less sophisticated participants, the appeal to share experience on social media is important the image of a performance matters.
- For local performance, distinctive selling points (performers/ story/ plot linking up the songs) come as a critical differentiator.



"(In order to attract audience...) There is a need to lay out the storyline and design an effective way of communication. I came across an interesting video. It took place in Paris. The performers were outside a train station and saw a piano. As they started playing, many people gathered to enjoy the flowing music. Then, another musician from different country joined. It is very interesting to see very different performers coming together to play music."



Audience has a general low engagement with local music performers, because the contact point has not been in place. Performing groups need to connect beyond ticketing information.

Recommend to friends Like on social media Most would like performing groups' Facebook Few mention the musician's Follow on social media page With a good show experience, participants are more likely to follow the group on social media Subscribe E-newsletter (EDM) Most are hesitant to leave New engagement form - Merchandise contacts Some respondents are enticed to buy merchandise as souvenirs, and as a token of support Single CD/ USB is well-received

Implications

- Support to performing groups happen mostly at the venue. A respondent said buying a ticket is already a token of appreciation.
- Outside venue, respondents are rigid in taking the initiative to receive performers' updates (i.e. social media follows & E-newsletter)
- They are not reluctant to support the groups and would even consider purchasing merchandise.
 However, they are calling for a relationship with a more personal touch which is currently unavailable.

Call for interaction is high among music audience as usual performance settings only provide limited performer-audience communication. Pre/post-show sharing and backstage trips are mentioned.

Respondents are highly open to social media promotion, but they seek attractive/ interesting content (e.g. behind the scene, performers' introduction, review of show held) beyond ticketing information.



"Production cost of an album is too high for

purpose at a lower cost. I can also get the CD

groups. A single CD could serve the same

signed so there is more interaction.'

ORCHESTRA: Audience have strong trust in reputable performing groups as it gives confidence in their ability to illustrate music pieces via excellent techniques and teamwork.

Key findings

Motivation

- Most active participants have a western music education background (e.g. piano & violin), therefore higher familiarity with western composers and music piece.
- Fascination with orchestra comes from the concerted effort of a large crew and the layered rhythmic music by various instruments.



"The way I enjoy music is to immerse in a long and flowing piece. Pop is something different as length is shorter and feels more upbeat."



"By teamwork, I mean when the conductor nods or stares at the crew. Those signals also hit me."

Lapsed music participant

Lapsed music participant

Sense of quality

- Large performing group is an upfront indicator of quality (richness)
- Good technique wins trust. In contrast, substandard performance (e.g. off-pitch) could be irritating. When performers' quality is hard to predict, some decide by the anticipation of quality teamwork.
- A storyline/ scene setting to pull songs together is well-liked.

Collaboration

Most audience are fine with collaborating with pop music as long as it does not defeat the main purpose to attend the performance – immerse in astounding and pleasant music by the orchestra.

Opportunities

Keep up with good quality

- Continuously delivering good shows to establish track record
- Current communication heavily relies on word-of-mouth.
 Reputation will gradually grow and bring more audience.

2

Emphasis on teamwork

 Apart from cues on stage, groups could consider showing up in team/ show interaction on online promotion materials

3

Right balance between pop & classics

 While collaboration could be tailored for novice audience, skewing too much to pop could drive experienced audience away



JAZZ: Jazz performances are often more interactive and less formal, so they have better opportunities to expand in alternative performing venues.



- The performer line-up is the most important factor
- Foreign performers generate higher appeal and a sense of anticipation
- Crossover between Jazz performers could be enticing, but the line-up should be carefully designed to ensure positive chemistry among performers

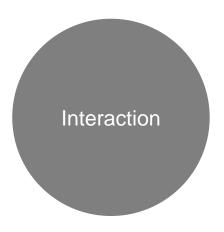


"At French May, some well-known performers were invited to Hong Kong. They played some French country music and made me want to watch."

Ambience

- Most Jazz participants have experience in attending shows in bars/ smaller venues as the vibe is cosier and more intimate
- Less common venues also curate an experience that is "cool" and "edgy"
- The small chat/ drinks/ interaction on/off stage brings delights

→ A smaller venue is a feasible option to bring participants closer



 Compared with other music forms, interactions in Jazz performance go multi-way (performers to audience, audience to performers, audience to audience), and the ambience is much more casual. Therefore, they could take place in various venues such as bars.

Active music participant

"Jazz bar is not like theatre. Personally, I don't like alcohol but I enjoy holding the wine and staying close to other audience. The performers stand right in front of you and do eye contact. This is the interaction."



CHINESE MUSIC: "Old-fashioned" image and little knowledge of the genre set upfront barriers to wider participation. Start with baby steps to rectify the image and educate audience.

Key findings

"Old-fashioned" image

 Most playbacks of the genre are "noisy", "boring" and "oldfashioned"



"You gonna be questioned when inviting friends to a Chinese orchestra performance. Then, I need some selling points to convince them, such as Tan Dun as a famous conductor or worth a premium price."

Lapsed music participant

Limited knowledge

 Education is not as prevalent at schooling stage; thus, receptiveness and knowledge of Chinese music are very low in society. There are very few recalls on big names/ signature piece

Changing trends

- Minority of respondents have experience with Chinese Music. They are beginners in the field.
- Still, opportunities exist if awareness is raised. Art groups may try
 to rejuvenate the genre image by collaborating with pop singers
 (e.g. Hins Cheung). Respondents find collaboration between
 musicians of Chinese Music and literature figures appealing.

Opportunities

The key step to expand – raising interest

- Chinese music shall deliver a sense of youth/ vibrancy
- Equip the local with Chinese music knowledge (e.g. famous musicians/masterpieces) so that they can locate an entry point
- In addition to nurture sophisticated appreciation, grow cultural acceptance to expand its audience base

Communicate selling points

 Although learning Chinese music is not popular, there are indeed some learners. Tap on them with familiar songs and master-level performers



"I am a Gu Zheng learner, so I sometimes play the songs at home. It will be attractive to me if the show features some songs I know, or a reputable musician."



Cross-category (e.g. literature & visual arts) collaboration can expand audience base. Some would need to be executed with care.

Well-accepted approaches

 Across groups, the majority of respondents suggest small-medium groups collaborate with celebrities/ field experts to generate talking points. Directions include -



Literature

• Author Miha(米哈) x Hong Kong Chinese orchestra



Visual arts

 Composer Fung Lam x Photographer Wing Shya

A cappella x theatre Orchestra x dance Jazz x local drama

 Cross-over with pop singers (Gin Lee)

Entertainment



"It is good for performing groups to collaborate with pop stars, at least Gin Lee's fans will buy tickets and support and tap into a wider base. It is a winwin."

Lapsed music participant

Approaches to be executed with care

East meets West

- Majority of respondents, especially active participants are indifferent to Chinese and Western music crossover
- Audience have little experience on cross-over, thus have more confidence over instruments with the same originality.



"Orchestra can't play Yellow River (黄河)、 Butterflies in Love (梁祝) in the way Chinese instruments do. Foreigners could be astonished listening, but as we know both instruments, this just doesn't sound harmonic."

Art-tech

Active music participant

- The quality of music performance outweighs art tech usage
- Few find it challenging to imagine how art tech blends in well with music, thus causing concern
- That said, a price range <\$200 will trigger them to explore.



"Art (music) and tech must support and interact with each other, or else it would just be an unpalatable slide show in a banquet."

ultura

Small-medium performing groups shall make themselves distinguishable with a brand icon and unlock potential audience base with collaboration.

Cultivating own icon

- ✓ Encourage musicians to start their own social media pages
- ✓ Include their contacts (e.g. QR code direct to performers' page) in promotion materials
- × Too hard-selling only featuring upcoming show information. Build a vivid and all-rounded image by posting the making-of and trailers.

Collaboration

- ✓ Engage with potential audience who are currently participants in other cultural categories (literature/ visual arts etc.). They are easier to convert based on their interest in culture/ arts.
- ✓ In collaboration performance, ensure elements from both categories are shown.

Exposure

Before purchasing tickets from a new performing groups, respondents want to ensure the quality.

✓ Consider trailers online as well as free mini-shows at public places, such as shopping malls (K11 Art Mall, Pacific Place) and outdoor art venues (Tai Kwun, WKCD).

Promotion tactics

- ✓ To tap on audience who need a show partner, reach out to them with early bird options as it brings the purchase discussion earlier and helps them fix hangout activities, ideally around a month in advance.
- ✓ Discount upon buying 2 or 3 tickets could further trigger purchase and justify invitation of friends.



"If I know there is a show next month and discount is available, I will immediately ask my friend whether we should go as our next gathering. Discount of bulk purchase would make it even better."



Most small-medium groups face challenge from lack of well-known performers. Optimizing communication strategies and performance arrangement might drive participation interest.

Major challenge – lack of well-known performers

Building performers' image and fame take time. Performing groups shall step up the process with the below considerations –

- Encourage musicians to start their own social media pages
 - Social media sharing drive WOM, which is particularly influential among participants less engaged in the field
- ✓ Include their contacts (e.g. QR code direct to performers' page) in promotion materials
- ✓ Communicate own strengths/ expertise/ merits
- ✓ Demonstrate team spirit show up as a team
- Too hard-selling only featuring upcoming show information. Build a vivid and all-rounded image by posting the making-of and trailers.

Ways to narrow the gap

Participants are generally supportive to small-medium groups but require additional push to final purchase. Suggestions include:

Communications

- ✓ Early communication via season brochure and social media pages
- ✓ Online trailers and free public mini-shows to raise group profile and demonstrating high-quality performance
 - Shopping malls (K11 Art Mall, Pacific Place) and outdoor art venues (Tai Kwun, WKCD) are some suggested venues

Promotion tactics

- ✓ To tap on audience who need a show partner, provide early bird option to bring purchase discussion earlier and block participants' calendar
- ✓ Discount upon buying 2 or 3 tickets could encourage group participation

Collaboration

✓ Generate talking points and recruit participants from other cultural categories. Respondents liked the ideas of collaborating with literature and visual arts.



"If I know there is a show next month and discount is available, I will immediately ask my friend whether we should go as our next gathering. Discount of bulk purchase would make it even better."



Respondent profile (Active participants)

			Demo	ographics			Arts participation overview			
	Gender	Age	Marital status; have kids	Occupation	Education level	Monthly household income	No. of arts event participation in past 1 year	Music genres participated and frequency	Participation in non- local production pre COVID-19	
R1	F	41	Single/N	Information technology	Bachelor	\$30,000- \$39,999	3	Orchestral Music 1 time; Choir 1 time; Non-music performance 1 time	Yes/70%	
R2	F	37	Married/ 1 kid (4 y.o.)	Wine wholesale	Bachelor	\$20,000- \$29,999	2	Chamber Music 1 times; Jazz Music 1 time	No	
R3	M	40	Married/N	Eyewear retail	Bachelor	\$50,000- \$59,999	2	Western Instrument - Solo 1 time; Jazz Music 1 time	Yes/100%	
R4	M	26	Single/N	Education	Bachelor	\$30,000- \$39,999	3	Orchestral Music 1 time; Chamber Music 1 time; Unknown genre 1 time	Yes/50%	
R5	F	39	Single/N	Garment retail	Bachelor	\$50,000- \$59,999	4	Orchestral Music 1 time; Western Instrument - Solo 2 times; Jazz Music 1 time	No	
R6	M	31	Married/N	Non- profitable sector	Bachelor	\$100,000 or above	3	Orchestral Music 1 time; Jazz Music 1 time; Non-music performance 1 time	Yes/100%	

Definitions:

"Past 1 year" refers to period from Jul 2021 to Jun 2022

"Pre-COVID-19" refers to period before Jan 2020



Respondent profile (Lapsed participants)

Demographics							Arts participation overview				
	Gender	Age	Marital status; have kids	Occupation	Education level	Monthly household income	Participation in paid performing art in past 1 year	Pre-COVID- 19: Participation frequency	Pre-COVID-19: Music genres participated and frequency	Pre-COVID-19: Participation in non-local production	Participation intention in future 1 year
R1	М	34	Single/N	Finance	Bachelor	\$30,000- \$39,999	N	2	Chamber music 1 time; Orchestral music 1 time	Yes/30%	Very high
R2	М	26	Single/N	Material manufacturing	Bachelor	\$40,000- \$49,999	N	3	Chinese music 1 time; Orchestral music 1 time	N	Quite high
R3	M	34	Single/N	Logistics	Bachelor	\$60,000- \$69,999	N	2	Western instrument – solo 1 time; Orchestral music 1 time	N	Very high
R4	F	37	Single/N	Healthcare industry	Bachelor	\$100,000 or above	N	2	Orchestral music 2 times	N	Quite high
R5	F	35	Married/ 1 kid (3 y.o.)	Hospitality	Bachelor	\$100,000 or above	N	4	Orchestral music 2 times	Yes/40%	Very high
R6	M	35	Single/N	Automobile trading	Bachelor	\$50,000- \$59,999	N	2	Chamber music 1 time; Jazz 1 time	Yes/50%	Quite low

Definitions:

"Past 1 year" refers to period from Jul 2021 to Jun 2022

"Pre-COVID-19" refers to period before Jan 2020

"Future 1 year" refers to period from Aug 2022 to Jul 2023



Section appendix

Photo credits

BIOS monthly

1 image on slide 43, retrieved from https://www.biosmonthly.com/article/7846



Boston symphony Orchestra, Inc

1 image on slide 43, retrieved from

https://andrisnelsons.com/cds/boston-symphony-orchestra-wagner-sibelius/



Hong Kong Contemporary Music (Culture+)

1 image on slide 53, retrieved from

https://www.cultureplus.asia/zh/event/fung-lam-x-wing-shya-nocturnes/2022-09-02/



Hong Kong Repertory Theatre (Facebook)

1 image on slide 46, retrieved from

上班的途上, 遇上兩個話劇團的燈箱。... - 香港話劇團 Hong Kong Repertory Theatre | Facebook



Het Parool

1 image on slide 43, retrieved from

https://www.parool.nl/kunst-media/dirigent-jaap-van-zweden-het-leven-is-niet-altijd-maakbaar~bf05dddd/?referrer=https%3A%2F%2Fwww.google.com%2F



Hong Kong Philharmonic Orchestra

2 images on slide 45 and 46, retrieved from https://www.hkphil.org/what-s-on/2223-season





French May (HUSTLtime)

1 image on slide 53, retrieved from https://hustltime.com/french-may-arts-fest-2022/



Leisure and Cultural Services Department

1 image on slide 45, retrieved from https://www.lcsd.gov.hk/tc/index.html





Section appendix

Photo credits

Radio Television Hong Kong

2 images on slide 46 and 53, retrieved from https://programme.rthk.hk/channel/broadcaster/dj.php?id=790&lang=eng





Platon (The New Yorker)

1 image on slide 43, retrieved from





Ulifestyle

2 images on slide 45 and 46, retrieved from

大館「數碼熒房」穿越歷史時空 沉浸式動畫重現域多利鐵窗生涯 | 港生活 - 尋找香港好去處 (ulifestyle.com.hk)





West-Kowloon

1 image on slide 46, retrieved from https://www.westkowloon.hk/en/freespace#overview



