# MUSIC

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#### Audience profile

# 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	<ul> <li>Jazz</li> <li>Chinese orchestra</li> <li>Choir / A Capella</li> <li>Strings quartet / Chamber</li> </ul>	<ul><li>Solo performance</li><li>Vocal music</li><li>Opera</li></ul>		

Active participants (N=6 respondents identified. Definition: those who have participated in >2 paid music performance in P1Y)

- 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).

Lapsed participants (N=6 respondents identified. Definition: those who ceased participation since COVID-19 outbreak)

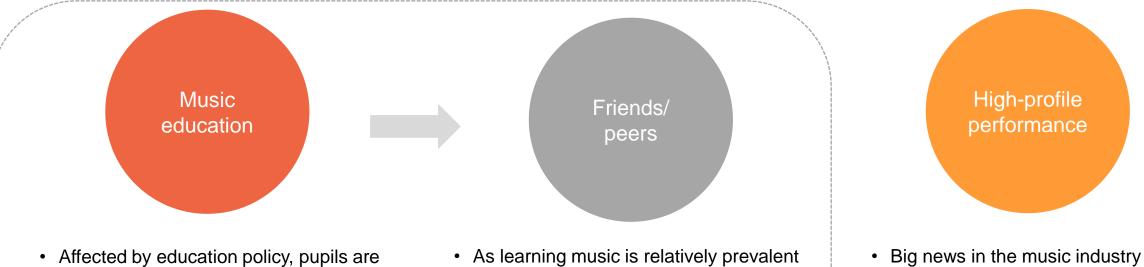
- Majority see attending music performances as a **social gathering**. These participants find orchestra performance good for value, because a big crew is performing for them as compared with other music genres.
- The tendency to attend with peers hold back their return to live musical performance as 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.



#### Music

#### Triggers of initial engagement

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



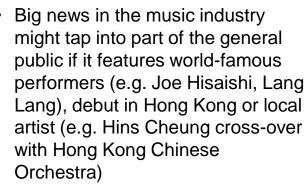
- encouraged to learn one instrument
   9 learners are observed (6 Active participants + 3 lapsed participants)
- Few respondents have experience in choir and Acapella
- → Relatively high prevalence at schooling stage

 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.



"我自己唔玩樂器嘅。之前我同學俾咗我張Jazz CD, 從此之後我就開始好愛Jazz。然後我一直keep著買學 生票去音樂表演同音樂節。"

非活躍音樂參與者





#### Consideration factors – core

Music

# 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



"譬如<u>郎朗</u>啦,你好容易可以邀請到 朋友,大家其實(就算)唔識(音樂但) 個個都知道(<u>郎朗</u>)唻嘛,咁所以你就 好容易能夠去邀請到人哋去試吓啦。'

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"有啲人雖然唔係音樂嘅fans,但佢 哋都會聽過<u>久石讓</u>呢啲咁出名嘅音 樂家。"

非活躍音樂參與者



Examples of figures/ groups well-known **among** fans

"如果Jaap van Zweden 嚟<u>香港</u>,我 一定會去睇,因為佢好出名。"

"如果開返闢,請返啲大師返嚟,例如

嗰啲唔知名嘅表演者,我一定揀

Boxson • "

Nelsons and Boxson 來香港, 比起香港

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活躍音樂參與者

#### 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.



#### Consideration factors – supplementary

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

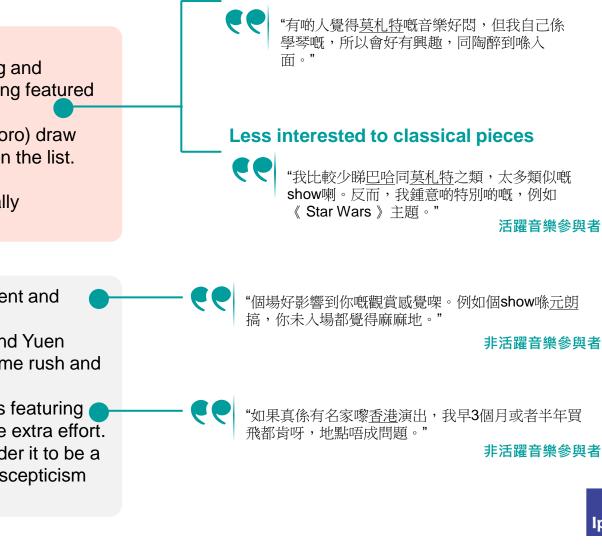
#### Orchestra:

- 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.



#### Online promotion channels & suggestions

### 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

Online channels	<b>U</b> Lifestyle Lifestyle page	LCSD webpage	Performing groups' social media	Performing groups' email newsletter	Performers' social media	Underground organisers' page (Jazz specific)	Word-of-mouth
Active							
Lapsed	<b>&gt;</b>			<ul> <li>Image: A start of the start of</li></ul>			*
	•		•	•			

Important information channel

Information channel mentioned

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



"如果佢可以分享個人生活、係KOL channel 度做啲迷你表演 同埋傾吓嚟緊嘅計劃,我會更願意去了解佢。" 非活躍音樂參與者

### 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
- $\rightarrow$  Gather all information/updates from small-medium groups so the hub becomes a gateway/ go-to destination for field update
- $\rightarrow$  When engaging with followers, watch out for post content/frequency and copywriting style to avoid information influx



Niche

好好睇睇,應該比多啲關注細團體

非活躍音樂參與者



#### Offline promotion channels & suggestions

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

#### Mass-facing

Offline channels	Billboards (esp. at public transport hub)	Mailing performing groups' newsletter	RTHK 香港電台 Mass media	Season brochure
Active		<ul> <li></li> </ul>	<ul> <li>Image: A start of the start of</li></ul>	*
Lapsed	*			

- Season brochure help active participants to bookmark their schedule 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

Niche

"我係年初睇季刊去了解每個月有 乜特別。我會mark低日期係開賣 日一次過買。" 活躍音樂參與者

### 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



#### Poster design

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



# 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**

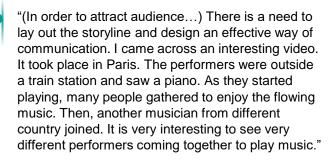
 General audience set basic criteria for "music performance" – no off-pitches, minimal mistakes in show arrangement/ logistics

> "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."

- 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.



#### Lapsed music participant



#### Post-show engagement

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.

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**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 隻碟可能會覺得貴,你出隻single可以控制 返自己個成本,跟著現場可以鋪枱簽名,咁樣 可以engage 到, 同埋呢啲真係Interactions。"



- 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.



Music

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

- 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.

(我享受音樂嘅方式係沉浸喺悠長流暢(職樂曲之中。流行曲不同,因為歌曲短, 節奏明快啲。"



"團隊合作所指嘅係指揮點頭或 者望著啲演奏人員。呢啲細節好 中我。"

非活躍音樂參與者

#### 非活躍音樂參與者

#### 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.



#### 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.

#### **Emphasis on teamwork**

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

#### **Right balance between pop & classics**

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

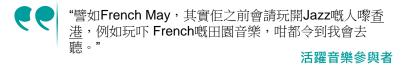


#### Genre findings: Jazz

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

Performers

- 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





- 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

 $\rightarrow$  A smaller venue is a feasible option to bring participants closer



"Jazz酒吧唔似劇院。我個人唔鍾意飲酒,但我鍾意攞著酒同其他 觀眾close啲。表演者企喺你面前,有眼神交流,呢啲就係互動。"



Interaction

Compared with other music forms,

interactions in Jazz performance

audience, audience to performers,

Therefore, they could take place in

audience to audience), and the

ambience is much more casual.

various venues such as bars.

go multi-way (performers to





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.



#### "Old-fashioned" image

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



"邀請啲朋友參加<u>中國</u>管弦樂隊表演嗰時,啲人會好奇問點解,咁我 就需要一啲賣點嚟說服佢哋,好似譚盾係著名指揮家所以值得咁貴 咁。" **非活躍音樂參與者** 

#### 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



"我彈古箏嘅,自己喺屋企都會播古箏彈嘅歌曲,咁所以如果佢有一啲 曲目係我有學過或者我知道嘅,有個大師級嚟表演,我都會睇。"

#### 非活躍音樂參與者



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

#### Well-accepted approaches

Entertainment

 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

# Cultural



#### 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)

**そ** (\*對於 作係 至少 世様



#### 非活躍音樂參與者

#### 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.

"一個Orchestra去演奏一首中樂係做唔到用一 團演奏嘅feel,譬如 。啲鬼佬可能覺得好天籟之音,但可能 我哋有好多根深蒂固嘅中國感覺,個聲係點 活躍音樂參與者

#### Art-tech

- 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 tech嚟講,藝術(指音樂)同科技之間要有 互補同互動,如果唔係同我一邊播歌,一邊 show投影影像有分別。"



Music

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

Cultivating own icon	Collaboration			
<ul> <li>Encourage musicians to start their own social media pages</li> <li>Include their contacts (e.g. QR code direct to performers' page) in promotion materials</li> <li>Too hard-selling only featuring upcoming show information. Build a vivid and all-rounded image by posting the making-of and trailers.</li> </ul>	<ul> <li>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.</li> <li>In collaboration performance, ensure elements from both categories are shown.</li> </ul>			
Exposure	Promotion tactics			
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	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.			

- places, such as shopping malls (K11 Art Mall, Pacific Place) and outdoor art venues (Tai Kwun, WKCD).
- ✓ Discount upon buying 2 or 3 tickets could further trigger purchase and justify invitation of friends.



"如果我知道下個月有演出而且有discount,我會立即問我啲朋友下次聚 會睇好唔好。大批買有折會更好



# 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

- $\checkmark$  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.



"如果我知道下個月有場show,而且咁啱有折,我會即刻問朋友會唔會一齊去囉,所以購買數量多有平都有佢嘅吸引力。



### Section appendix Respondent profile (Active participants)

Demographics							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	М	40	Married/N	Eyewear retail	Bachelor	\$50,000- \$59,999	2	Western Instrument - Solo 1 time; Jazz Music 1 time	Yes/100%	
R4	М	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	М	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* 



### Section appendix 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	Ν	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	Ν	3	Chinese music 1 time; Orchestral music 1 time	Ν	Quite high	
R3	Μ	34	Single/N	Logistics	Bachelor	\$60,000- \$69,999	Ν	2	Western instrument – solo 1 time; Orchestral music 1 time	Ν	Very high	
R4	F	37	Single/N	Healthcare industry	Bachelor	\$100,000 or above	Ν	2	Orchestral music 2 times	Ν	Quite high	
R5	F	35	Married/ 1 kid (3 y.o.)	Hospitality	Bachelor	\$100,000 or above	Ν	4	Orchestral music 2 times	Yes/40%	Very high	
R6	Μ	35	Single/N	Automobile trading	Bachelor	\$50,000- \$59,999	Ν	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* 

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#### Section appendix

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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

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

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Ulifestyle

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#### West-Kowloon

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ULifestyle

