# 2010
# Survey of Classical Music and Ballet Audiences

## (based on 2009)

CONTENTS

MCST
Ministry of Culture, Sports and Tourism

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# Overview

## 1. Objective of the Survey

The performing arts sector has to date been approached from the standpoint of public service rather than based on market logic. However, the necessity for the performing arts market to at the very least ensure its industrial competitiveness has recently been heightened. In this regard, efforts have begun to be made to foster exact analyses of the data pertaining to audiences and the efforts to develop the attendance.

This survey examines whether a specific class of audience can be identified in conjunction with particular genres via an analysis of the current state of performing arts audiences as a whole. By collecting samples from representative audiences of the performing arts, an attempt is also made to facilitate the collection of the information needed to establish long-term marketing strategies and cultivate potential audiences.

## 2. Survey Approach

The scale of attendance by performing arts sector genre and the current state thereof were analyzed based on interviews with specialists. In this regard, the classical music and ballet performances were selected as the target of the survey. Focus Group Interviews were implemented to analyze the characteristics of classical music and ballet viewership, with the questions for the survey prepared in accordance with these results. The classical music and ballet attendance was assessed through actual visits to venues (80%) and an online survey of clubs.

Ballet and classical music is characterized by the fact that they are accessible to regular people. Based on the determination that it is difficult to analyze the characteristics of viewers in an exact manner when conducting a survey that did not involve a clear separation of paid and unpaid audiences, the scope of audiences was limited to paid viewers.
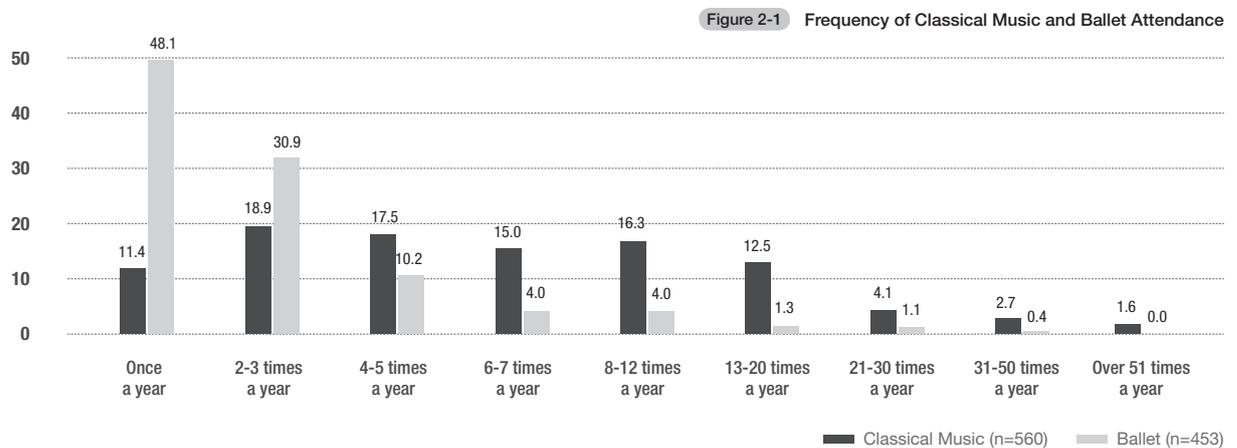
Table 1-1    Survey Method

| | Survey of Viewers at Actual Venue Sites | Survey of Viewers at Actual Venue Sites |
|---|---|---|
| Target | Paid classical music / Ballet viewers over the age of 16 from the Seoul and Gyeonggi area. | Members of classical music / Ballet clubs who viewed a performance during the past year |
| Survey Method | Self-administered interview | Online survey |
| Number of Effective Samples | Classical music: 400 viewers<br>Ballet: 400 viewers | Classical music: 100 viewers<br>Ballet: 100 viewers |
| Sampling Method | Purposive allocation sampling | Random sampling |
| Approach | Classical music / Ballet performance lists compiled during the survey period (September-October) | Classical music / Ballet clubs on major portal sites |

# The Current State and Features of Classical Music and Ballet Attendance

## 1. Frequency of Classical Music and Ballet Attendance

Although 18.9% of respondents stated that they attended classical music performances '2~3 times a year', almost 70% of respondents were found to attend classical music performances '4 or more times a year'. On the other hand, 48.1% of ballet goers answered that they attended such works 'once a year'; meanwhile, only 30.9% of respondents asserted that they attended '2~3 times a year'. To this end, almost 80% of respondents were infrequent audiences (less than 3 times a year).

**Figure 2-1** Frequency of Classical Music and Ballet Attendance



| | Once a year | 2-3 times a year | 4-5 times a year | 6-7 times a year | 8-12 times a year | 13-20 times a year | 21-30 times a year | 31-50 times a year | Over 51 times a year |
|---|---|---|---|---|---|---|---|---|---|
| Classical Music (n=560) | 11.4 | 18.9 | 17.5 | 15.0 | 16.3 | 12.5 | 4.1 | 2.7 | 1.6 |
| Ballet (n=453) | 48.1 | 30.9 | 10.2 | 4.0 | 4.0 | 1.3 | 1.1 | 0.4 | 0.0 |

# Comparison of Audience Patterns of Classical Music and Ballet Performance
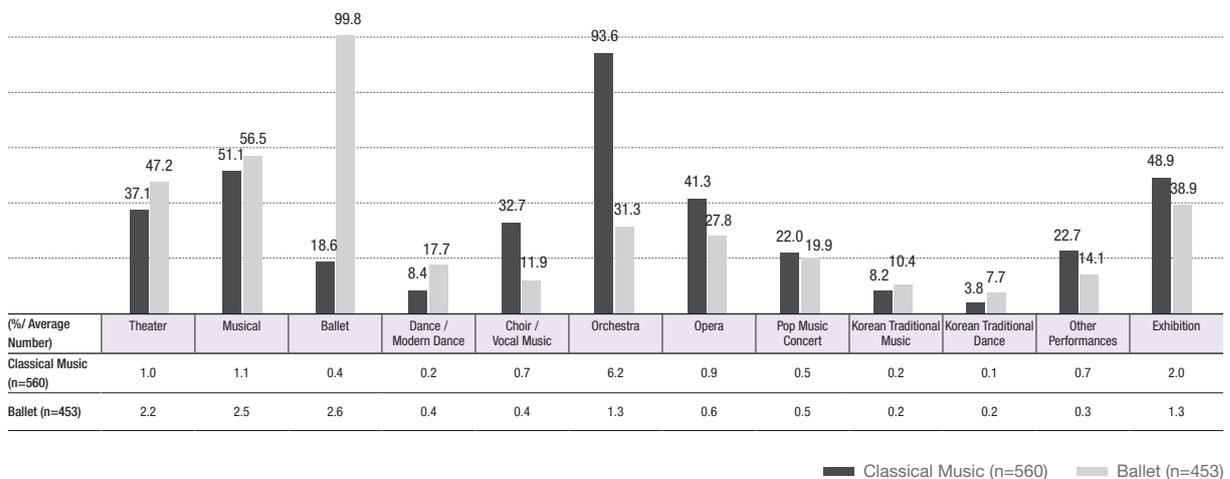
## 1. Tendency of Classical Music and Ballet Audience

*Classical Music Audiences, Manic-like Knowledge vs. Ballet Audiences,*
*Tendency to be General Consumers of Performing Arts*

### 1) Frequency of Attendance

Classical music audiences tended to concentrate on orchestral music (average 6.2 times), and exhibited manic tendencies such as listening to classical music everyday and collecting related information. On the other hand, ballet audiences tended to be consumers of performing arts as a whole, and to view theater and musical performances (an average of 2.2 times each) at a similar rate.
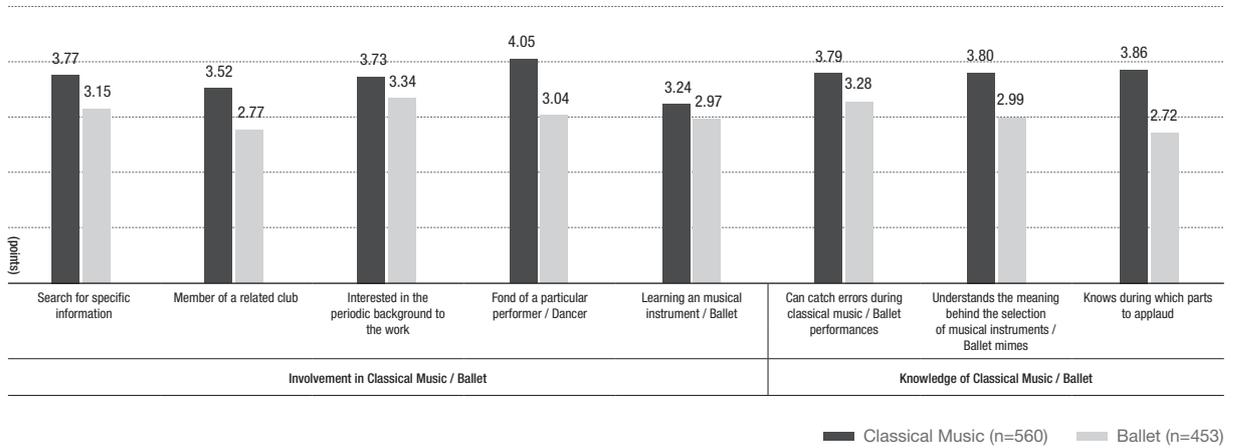
Figure 3-1    Frequency of Attendance



| (%/ Average Number) | Theater | Musical | Ballet | Dance / Modern Dance | Choir / Vocal Music | Orchestra | Opera | Pop Music Concert | Korean Traditional Music | Korean Traditional Dance | Other Performances | Exhibition |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Classical Music (n=560) | 1.0 | 1.1 | 0.4 | 0.2 | 0.7 | 6.2 | 0.9 | 0.5 | 0.2 | 0.1 | 0.7 | 2.0 |
| Ballet (n=453) | 2.2 | 2.5 | 2.6 | 0.4 | 0.4 | 1.3 | 0.6 | 0.5 | 0.2 | 0.2 | 0.3 | 1.3 |

Classical Music (n=560)          Ballet (n=453)

### 2) Degree of Involvement

Classical music audiences were found to possess almost manic degrees of understanding of classical music. This took the form of the ability to understand the meaning behind the selection of certain musical instruments and the musical repertoire performed, and knowledge related to the proper manner in which to behave as audiences. Conversely, ballet audiences were found to possess limited knowledge and information pertaining to ballet performances.
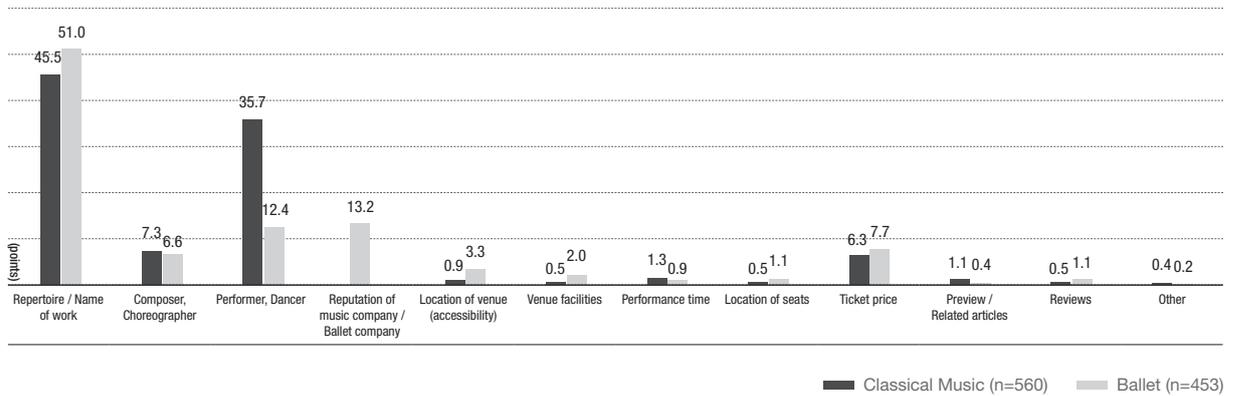
Figure 3-2    Degree of Involvement



Search for specific information — 3.77 / 3.15
Member of a related club — 3.52 / 2.77
Interested in the periodic background to the work — 3.73 / 3.34
Fond of a particular performer / Dancer — 4.05 / 3.04
Learning an musical instrument / Ballet — 3.24 / 2.97
Can catch errors during classical music / Ballet performances — 3.79 / 3.28
Understands the meaning behind the selection of musical instruments / Ballet mimes — 3.80 / 2.99
Knows during which parts to applaud — 3.86 / 2.72

Involvement in Classical Music / Ballet          Knowledge of Classical Music / Ballet

■ Classical Music (n=560)    ▢ Ballet (n=453)

## 3)    Selection of Performances

As such, classical music audiences took into consideration their understanding of the work and related factors (repertoire, composer, performer and conductor) when selecting a classical music performance to attend. Meanwhile, ballet audiences regarded not only the repertoire but also facilities and the location of the venue and performance time as being of importance when selecting a performance to attend.

Figure 3-3    Selection of Performances



Repertoire / Name of work — 45.5 / 51.0
Composer, Choreographer — 7.3 / 6.6
Performer, Dancer — 35.7 / 12.4
Reputation of music company / Ballet company — 13.2
Location of venue (accessibility) — 0.9 / 3.3
Venue facilities — 0.5 / 2.0
Performance time — 1.3 / 0.9
Location of seats — 0.5 / 1.1
Ticket price — 6.3 / 7.7
Preview / Related articles — 1.1 / 0.4
Reviews — 0.5 / 1.1
Other — 0.4 / 0.2

■ Classical Music (n=560)    ▢ Ballet (n=453)

## 4)    Motivations for Attendance

While the main motivations for viewing classical music were self-development and appreciation for art, the main motivations for viewing ballet were social (education of children) and esthetic ones rather than self-development.

Figure 3-4    Motivations for Attendance



Classical Music (n=560)    Ballet (n=453)



Classical Music (n=560)    Ballet (n=453)
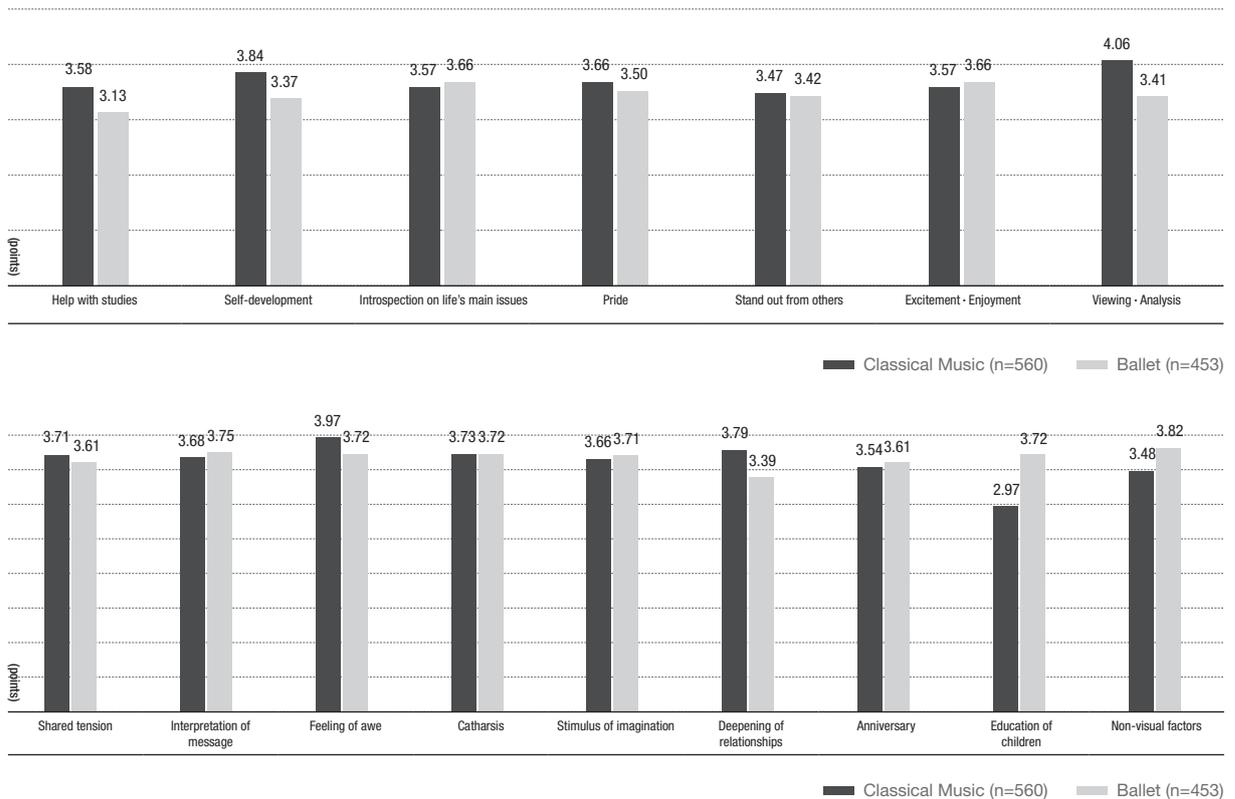
## 5)    Preferences

***Pursuing 'Auditory Enjoyment' vs. Pursuing 'Visual Enjoyment'***

This is evidenced by a look at the results of the survey regarding the preferred cultural art before and after the formation of a taste for cultural activities. In this regard, classical music audiences preferred pop music before the formation of their taste for classical music. They then expanded their interests to opera (34.5%) and musicals (25.2%) after their taste for classical music was developed. Meanwhile, ballet audiences tended to like 'musicals' before and after the formation of their taste for ballet. Both types of audiences showed a penchant for 'opera'. More to the point, while classical music audiences answered that they started to have an interest in opera via their enjoyment of music, ballet audiences answered that their interest in ballet had been piqued by narrative and visual factors associated with opera such as the 'stage', 'clothing', and 'story'.

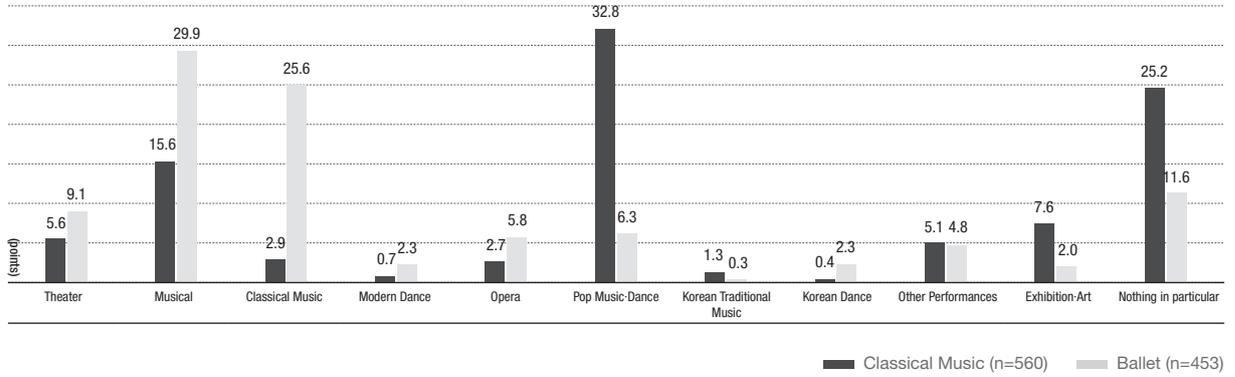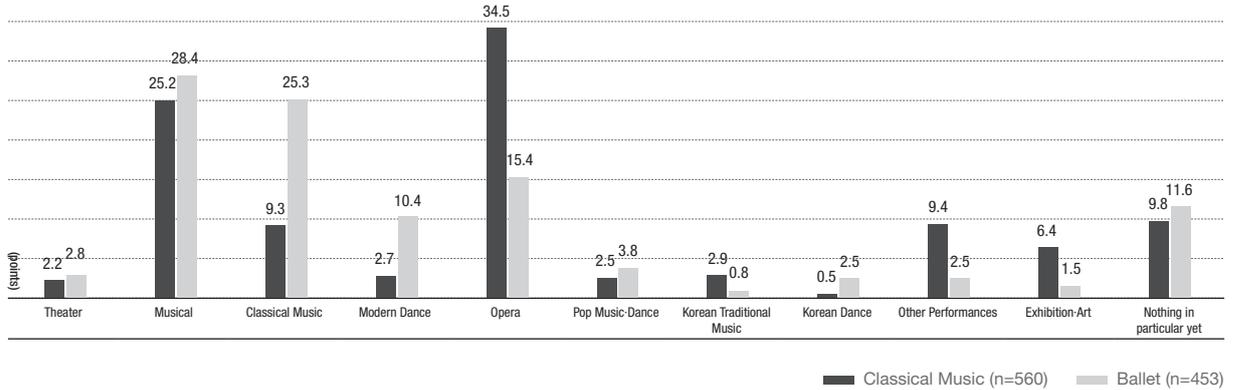**Figure 3-5**  Preferred Genre before the Development of Taste for Cultural Activities



Classical Music (n=560)    Ballet (n=453)

**Figure 3-6**  Preferred Genre after the Development of Taste for Cultural Activities



Classical Music (n=560)    Ballet (n=453)

Thus, while classical music audiences have a high preference for 'music,' ballet audiences prefer to view theater art and dance that combine a visual 'performance and story'.

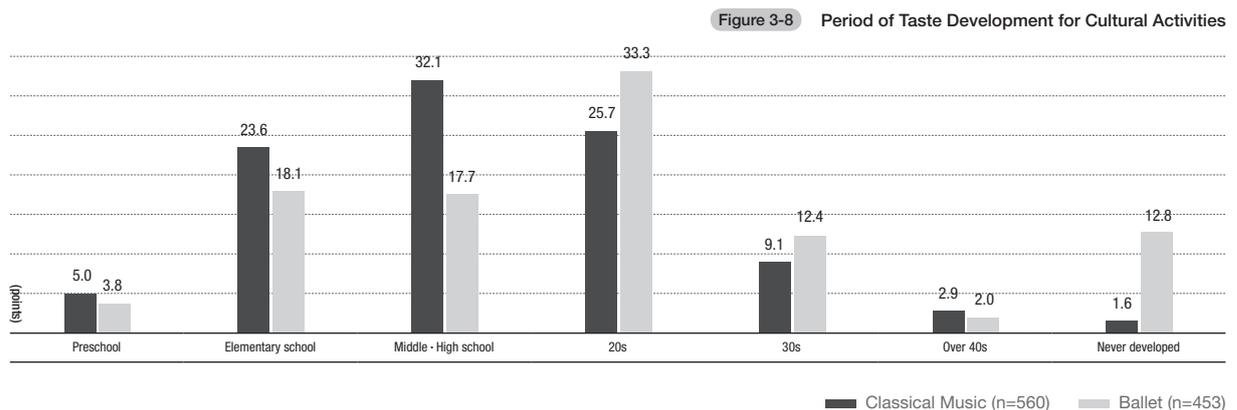**Figure 3-7**  Changes in the Preferred Performing Arts Path
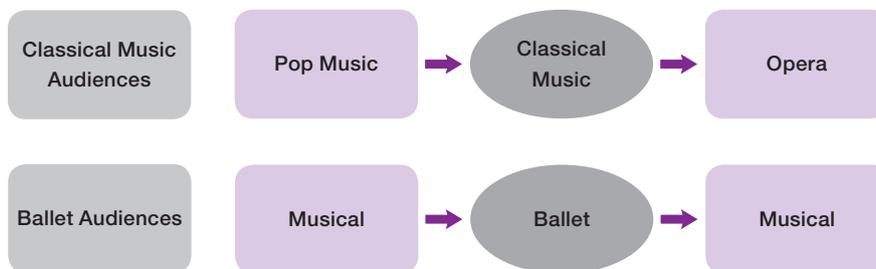
## 2. Development of Taste for Classical Music and Ballet Attendance

*Classical Music, via Education during the Mid and Late Teens vs. Ballet, via Direct Experiencing of Ballet Performances during one's 20s*
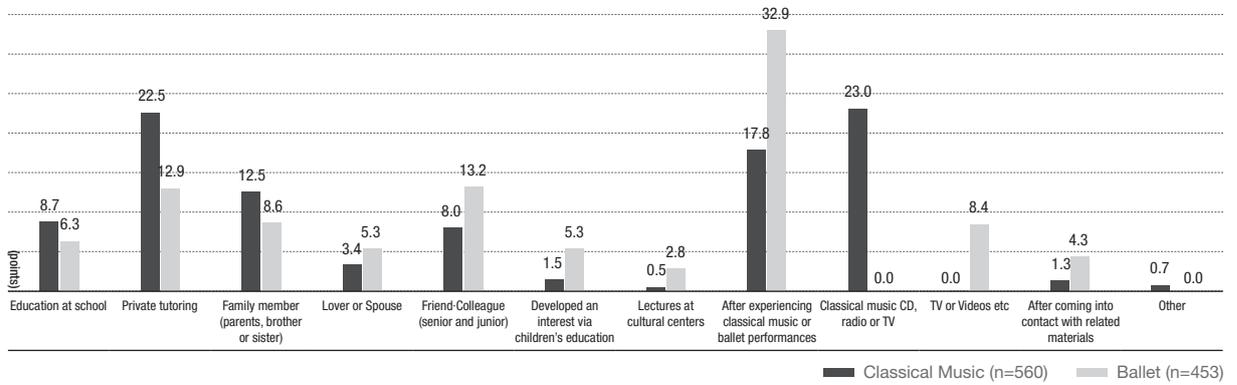
### 1) Period of Taste Development

Differences were also uncovered in terms of the period in which the taste for classical music and ballet was formed. The most commonly given answer among classical music audiences with regards to the formation of their taste for classical music was during 'middle and high school' (32.1%); this was followed by the '20s' (25.7%) and 'elementary school' (23.6%). Meanwhile, people's taste for ballet was for the most part formed during their 20s (33.3%). Another clear point of departure from classical music audiences was the fact that 55% of ballet audiences first developed such a taste after their 20s.

Figure 3-8  Period of Taste Development for Cultural Activities



(points)

| | Preschool | Elementary school | Middle · High school | 20s | 30s | Over 40s | Never developed |
|---|---|---|---|---|---|---|---|
| Classical Music (n=560) | 5.0 | 23.6 | 32.1 | 25.7 | 9.1 | 2.9 | 1.6 |
| Ballet (n=453) | 3.8 | 18.1 | 17.7 | 33.3 | 12.4 | 2.0 | 12.8 |

■ Classical Music (n=560)   ■ Ballet (n=453)

### 2) Factors behind the Development of Taste

A look at the process through which the taste for viewing classical music and ballet performances was developed revealed a close relationship with the period in which related education and performances were first experienced. Classical music audiences identified 'education' (31.2%) as the factor that most influenced the formation of their taste for cultural works. They also highlighted 'music albums, radio and TV' (26.4%). These can be regarded as a substitute experience closely related to classical music. Meanwhile, ballet audiences answered that this taste had been developed 'after they experienced ballet performances' (32.9%).
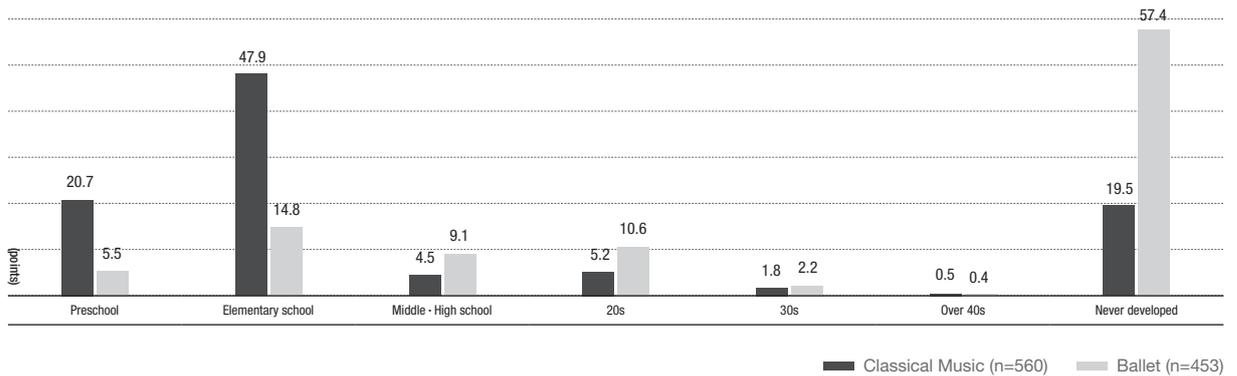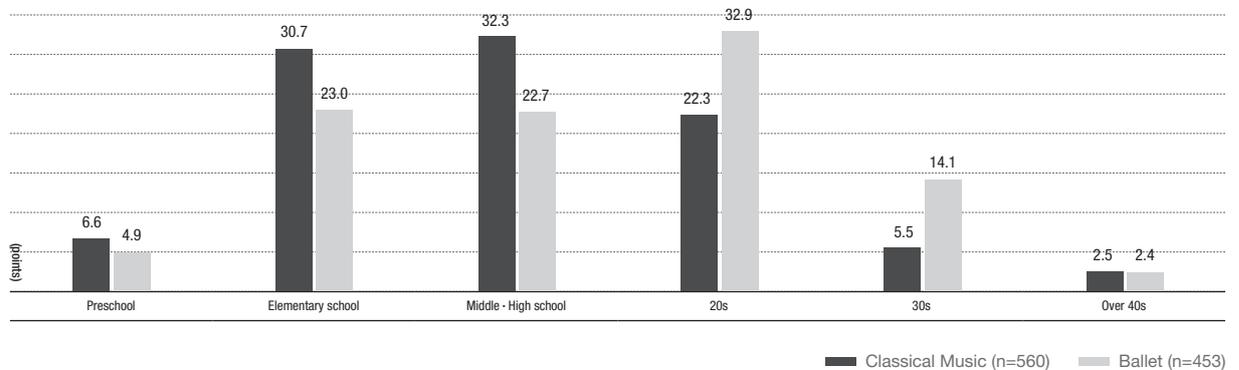
Figure 3-9 Factors behind the Development of Taste

(points)

| | Classical Music (n=560) | Ballet (n=453) |
|---|---|---|
| Education at school | 8.7 | 6.3 |
| Private tutoring | 22.5 | 12.9 |
| Family member (parents, brother or sister) | 12.5 | 8.6 |
| Lover or Spouse | 3.4 | 5.3 |
| Friend·Colleague (senior and junior) | 8.0 | 13.2 |
| Developed an interest via children's education | 1.5 | 5.3 |
| Lectures at cultural centers | 0.5 | 2.8 |
| After experiencing classical music or ballet performances | 17.8 | 32.9 |
| Classical music CD, radio or TV | 23.0 | 0.0 |
| TV or Videos etc | 0.0 | 8.4 |
| After coming into contact with related materials | 1.3 | 4.3 |
| Other | 0.7 | 0.0 |

## 3)    Education Period

In fact, classical music audiences exhibited higher degrees of relevant education than ballet audiences. 80.5% of classical music audiences received related education. The main periods in which such education began were during preschool (20.7%) and elementary school (47.9%). Meanwhile, a great number of ballet audiences answered that they had never received a related education (57.4%). In other words, the ratio of those who experienced a ballet related education can be estimate at 42.6%, or little more than half of the ratio who received a classical music education (80.5%). The most popular periods in which a ballet related education was experienced were while individuals were in elementary school (14.8%) and in their 20s (10.6%).

Figure 3-10    Education Period



(points)

| | Classical Music (n=560) | Ballet (n=453) |
|---|---|---|
| Preschool | 20.7 | 5.5 |
| Elementary school | 47.9 | 14.8 |
| Middle · High school | 4.5 | 9.1 |
| 20s | 5.2 | 10.6 |
| 30s | 1.8 | 2.2 |
| Over 40s | 0.5 | 0.4 |
| Never developed | 19.5 | 57.4 |

Differences were also uncovered in terms of the period in which audiences of both genres first experienced live performances. The majority of classical music audiences answered that they first had an opportunity to experience performance during their school days (69.6%). They experienced classical music performances at an early age, either during 'middle and high school (32.3%)' or even 'elementary school (30.7%)'. Meanwhile, half of the ballet audiences (49.4%) answered that they had first experienced a ballet performance in their 20s or later. The highest such ratio was in the 20s (32.9%), followed by 'elementary school (22.7%)' and 'middle and high school (22.7%)'. Thus, we can see certain similarities in terms of the period in which the taste for cultural activities was first developed.

**Figure 3-11**　Experience of First Performance



| | Preschool | Elementary school | Middle · High school | 20s | 30s | Over 40s |
|---|---|---|---|---|---|---|
| Classical Music (n=560) | 6.6 | 30.7 | 32.3 | 22.3 | 5.5 | 2.5 |
| Ballet (n=453) | 4.9 | 23.0 | 22.7 | 32.9 | 14.1 | 2.4 |

Education and previous performance experience have constituted the main influences in terms of the formation of a taste for classical music and ballet. Furthermore, those who received the necessary education during their teenage years exhibited a stronger likelihood of becoming frequent viewers (more than 4 times a year). As such, the importance of art education during the schooling period cannot be underestimated. Thus, the expansion of the base of audiences is predicated on have as many people experience such an education from an early age onwards as possible.

In addition, classical music audiences tend to regard the media as exercising a strong influence. In this regard, the media can be used as an alternative method of putting those who did not receive a cultural art education during their school days in contact with the cultural arts. Easier accessibility and popularization can be achieved by using forms of media such as music albums, radio, and TV as a tool to form a taste for classical music.

Meanwhile, the formation of a taste for viewing ballet was mainly influenced by previous experiences viewing performances. Those who experienced ballet performances during their time in school had a higher likelihood of becoming frequent viewers (more than 4 times a year). As such, it is important to provide opportunities for students to attend ballet performances. Furthermore, ballet audiences believed that were certain barriers (need for prior knowledge, costs, and difficulty to understand works) that prevent them from drawing closer to ballet. In this regard, the base of ballet viewers should be expanded through such means as simple explanations of ballet movements and subtitling.

# Analysis of Classical Music and Ballet Audience Taste Patterns

## 1. Attendance Type and Measures to Expand Audiences

Consequently, classical music audiences exhibited more negative opinions of new types of performances (combination with other genre, omnibus, new repertoires, and performance with explanations) than ballet audiences. They also preferred standardized performances. As they exhibited a strong tendency to expand the scope of their interests to the sub-genres of classical music rather than to performances from other genres, bundled goods involving the sub-genres of classical music should in fact be developed.

As such, rather than moving towards other genres, cross promotions with sub-genres of classical music should be planned in the case of classical music audiences. As ballet audiences subsequently move towards other genres such as musicals and theatrical works, more potential fans could be attracted by combining ballet performances with these genres.

The ballet genre has many audiences that can be classified as beginners and ballet audiences prefer classic repertoires (ex. 'The Swan Lake'). As such, it is necessary to attract audiences of other types of performances while continuously performing classical ballet repertoires and using them as a means to help infrequent viewers develop a taste for ballet performances. In addition, as ballet audiences exhibited a tendency to be generalized performance viewers who enjoy not only ballet but also other performances, one of the main tasks should be that of creating new combinations with other genres that might be regarded as being outside of the standard framework. More to the point, as ballet audiences pursue visual satisfaction, it becomes necessary to provide spectacles by holding cross-promotions with other genres such as dance and musical/theater.

For example, classical music audiences showed a strong preference for other music genres such as pop music concerts and jazz prior to the development of their taste for classical music. Thus, the base for the viewing of classical music should be expanded by introducing classical music to audiences of other musical performances or by developing joint promotions between musical genres. Meanwhile, ballet audiences answered that they became ballet audiences while watching musical performances. They also answered that they remained fond of viewing musicals and theatrical works even after they started to like ballet performances. Thus, means should be sought to create opportunities for musical and theater viewers to come into contact with ballet performances.

Recalling that classical music audiences placed great importance on factors such as performers, composers, and repertoires when selecting a performance and that they tend to be highly motivated by the appreciation of a work and self-development, the approach methods developed should include provisions pertaining to accompanying explanations.

Meanwhile, ballet audiences revealed that had difficulties understanding and drawing closer to ballet. In this regard, mechanisms such as the provision of explanations and subtitles allowing beginners to more easily understand ballet performances should be added. Given the preponderance of the answer 'children's education' as one of the motivations for viewing ballet performances, methods should be developed to increase demand among children/family audiences by developing repertoires for children and family such as the 'Nutcracker'.

Table 4-1    Summary of the Four Audience Groups

| | Item | Infrequent Viewers of Classical Music | Frequent Viewers of Classical Music | Infrequent Viewers of Ballet | Frequent Viewers of Ballet |
|---|---|---|---|---|---|
| **Viewing Status** | Most viewed performance, Annual frequency | Orchestral music / 1.6 times | Orchestral music / 8.3 times | Ballet / 1.6 times | Ballet / 6.6 times |
| | Frequency viewing classical music / ballet | Less than 3 times a year (30%) | More than 4 times a year (70%) | Less than 3 times (80%) | More than 4 times (20%) |
| | Preferred performance type | Orchestra + Opera | Orchestra + Solo instrumental music | Ballet + Fusion / Popular dance | Ballet |
| **Process of Determining which Performance to View** | Path through which performance info is obtained | People in immediate surroundings (39%) | Related sites (27%) | People in immediate surroundings (24%) | Related sites (23%) |
| | Type of companion | Friends, Seniors and Juniors (39%) | Friends, Seniors and Juniors (45%) | Friends, Seniors and Juniors (34%) | Friends, Seniors and Juniors (39%) |
| | Person determining which performance to see | Self + Friends / Seniors·Juniors | Self | Self + Friends / Seniors·Juniors | Self |
| | Ticketing Method | Internet (50%) | Internet (38%) | Internet (55%) | Internet (47%) |
| | Period in which reservation is made | Mid-range | Early | Mid-range and after | Early |
| | Actual cost of purchasing ticket | 39,000 won | 48,000 won | 53,000 won | 49,000 won |
| | Ticket discount method | Face value 44% | Membership price 47% | Face value 28% | Membership price 46% |
| | Today's performance: Paid / Unpaid | Paid 90% | Paid 93% | Paid 94% | Paid 98% |
| | Recent performance viewing satisfaction | Very satisfied = 23% | Very satisfied = 39% | Very satisfied = 26% | Very satisfied = 42% |
| **Formation of a Taste for Cultural Activities** | Education period | before and after the age of 10 | before and after the age of 10 | before and after the age of 16 | before and after the age of 16 |
| | First experience of a performance | before and after the age of 17 | before and after the age of 17 | before and after the age of 19 | before and after the age of 19 |
| | Period in which taste for cultural activities is formed | before and after the age of 18 | before and after the age of 18 | before and after the age of 17 | before and after the age of 20 |
| | Factors influencing the formation of a taste for cultural activities | Media consumption + Education | Media consumption + Education | Media consumption (performance) | Media consumption (performance) |
| | Preferred genre before the formation of a taste for cultural activities | Pop music 34% | Pop music 32% | Musical 31% | Classical music 36% |
| | Preferred genre after the formation of a taste for cultural activities | Musical 36% | Opera 40% | Musical 32% | Classical music 35% |
| | Frequency viewing related music albums and videos | Once a week = 17.6% | Everyday = 46.9% | No appreciation = 23% | 2-3 times a week = 26% |
| **Involvement** | Degree of interest | Low involvement | High involvement | Low involvement | High involvement |
| **Preferred Genre** | Performance type | Pop music | Classical music | Theater / Musical / Ballet | Theater / Musical / Ballet |
| **Viewing Motivations** | Aesthetic motivation Social motivation Self-development | Self-development + Social motivation (learning and relationships) | Self-development + Aesthetic (learning + appreciation) | Social relationships | Social + Aesthetic (relationships + appreciation) |
| **Selection Factors** | Work / Evaluation / Venue / Reputation | Work + Evaluation + Reputation | Work quality | Evaluation by those in one's immediate surroundings + Facilities | Facilities + Reputation |

| | Item | Infrequent Viewers of Classical Music | Frequent Viewers of Classical Music | Infrequent Viewers of Ballet | Frequent Viewers of Ballet |
|---|---|---|---|---|---|
| **Thinking Method** | Vertical thinking | Vertical thinking(-) | Vertical thinking(-) | Vertical thinking (+) | Vertical thinking (+) |
| | Horizontal thinking | Horizontal thinking(-) | Horizontal thinking(+) | Horizontal thinking(-) | Horizontal thinking(+) |
| **Tendency** | Prefer new attempts / Regard the location of seats as being important / Prefer performances with explanations / Outdoor concerts / Repetitive viewing | Prefer the performances with explanations + Regard the location of seats as being important + Repetitive viewing | Outdoor appreciation + Repetitive viewing | Prefer new attempts + Regard the location of seats as being important | Prefer new attempts + Regard the location of seats as being important |
| **Demographic Characteristics** | Distribution of frequent / Infrequent viewers | Frequent viewers of classical music 70% | | | Infrequent viewers of ballet 80% |
| | Age | 30~44 = 48.8% (20s and 30~40s are evenly distributed) | 30~44 = 43.9% (the ratio of students is high with the 19% of 19~24) | 30~44 = 43.3% (high ratio of single women, with 26% between the ages 25~29) | 30~44 = 56.8% (high ratio of single women with high income, with 26% between the ages of 30~34) |
| | Residential area | Gangnam 39.4% | Gangnam 40.5% | Gangbuk 35.2% | Gangnam 34.7% |
| | Religion | Christian 34.7% Non-religious 31.8% | Christian 35.1% Non-religious 31.2% | Non-religious 39.4% Christian 26.8% | Christian 32.6% Non-religious 32.6% |
| | Marital status | Single 45% | 54% | 55% | 50.5% |
| | Final academic background | Graduate school 17.6% | Graduate school 32.1% | Graduate school 20.1% | Graduate school 33.7% |
| | Major | Humanities and social sciences 37.6% Engineering 28.7% | Humanities and social sciences 31.5% Music 27% | Humanities and social sciences 35% Engineering 21.7% | Humanities and social sciences 41.4% Engineering 20.7% |
| | Membership | Ecame a member 10% | 40% | 35% | 57% |
| | Occupation | Professional / Freelancer / Office worker | Professional / Freelancer / Office worker | Professional / Freelancer / Office worker | Professional / Freelancer / Office worker |
| | Monthly income | 5.30 million won | 5.55 million won | 4.80 million won | 5 million won |
| | Monthly expenses on cultural activities | 140,000 won 2.7% of income | 180,000 won 3.3% of income | 140,000 won 3.0% of income | 210,000 won 4.3% of income |