

2010

Survey of Classical Music and Ballet Audiences

(based on 2009)

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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.

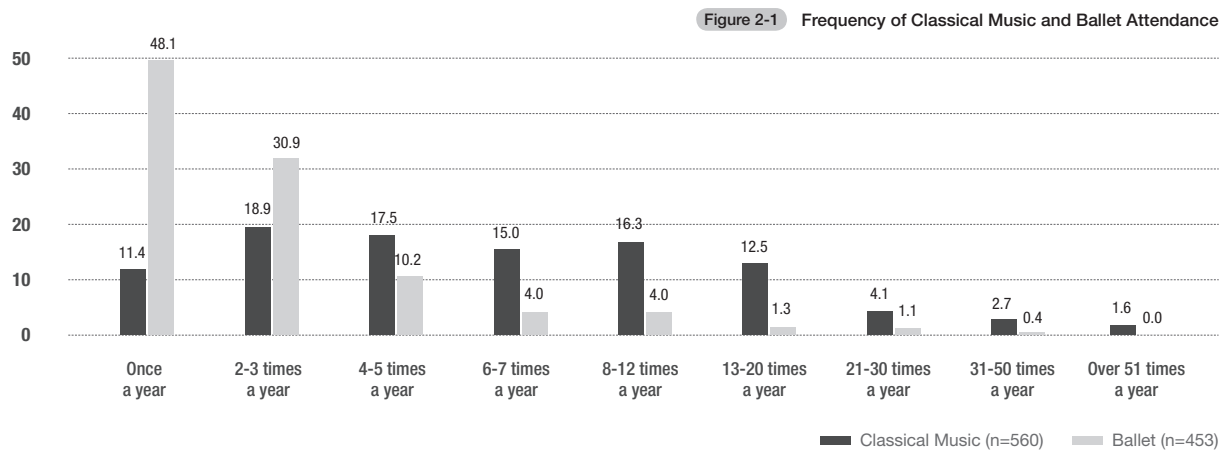
Table 1-1 Survey Method

	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 Ballet: 400 viewers	Classical music: 100 viewers 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).



Comparison of Audience Patterns of Classical Music and Ballet Performance

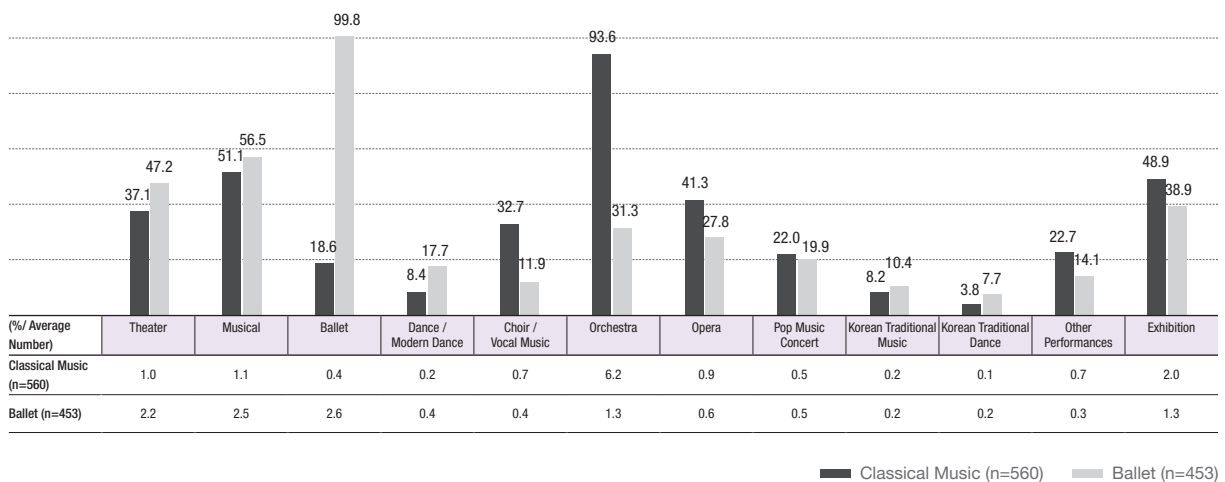
1. Tendency of Classical Music and Ballet Audience

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.

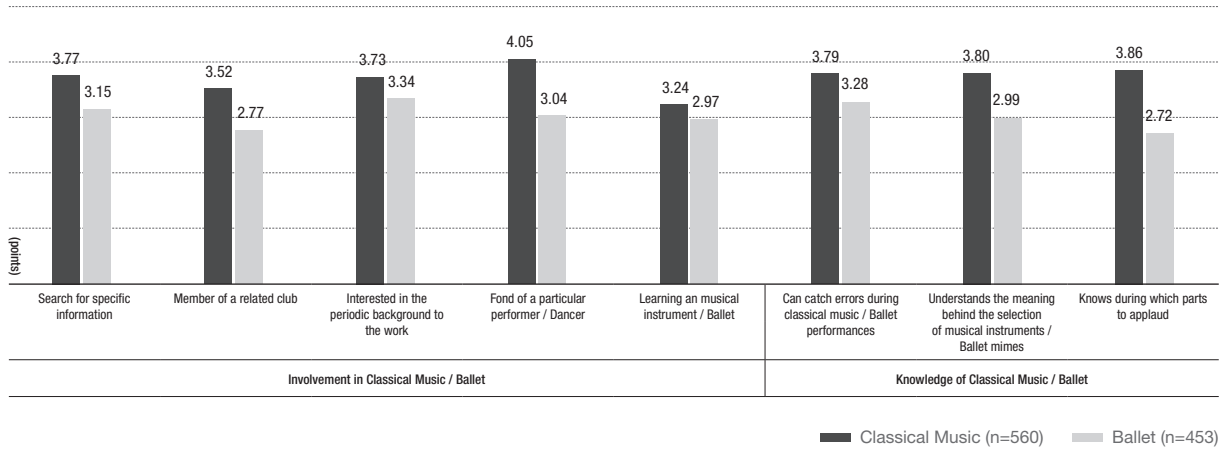
Figure 3-1 Frequency of Attendance



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.

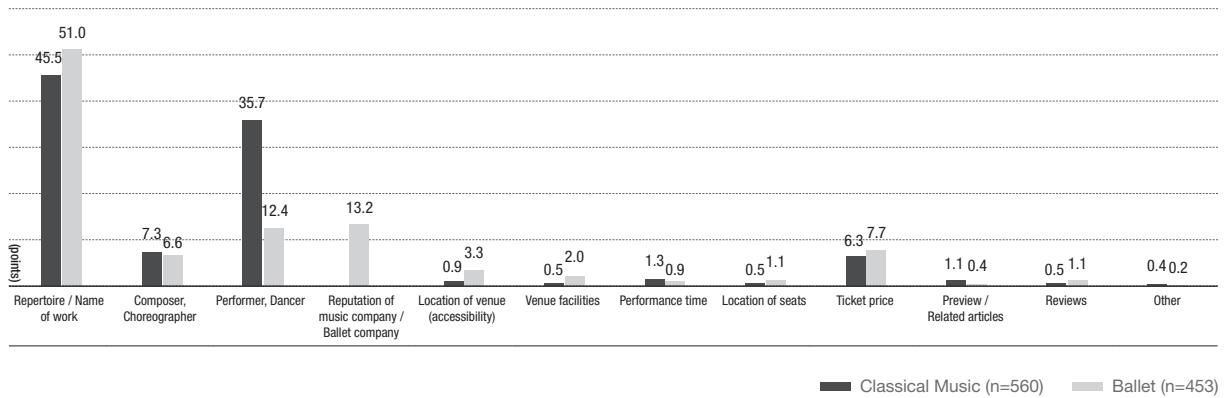
Figure 3-2 Degree of Involvement



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.

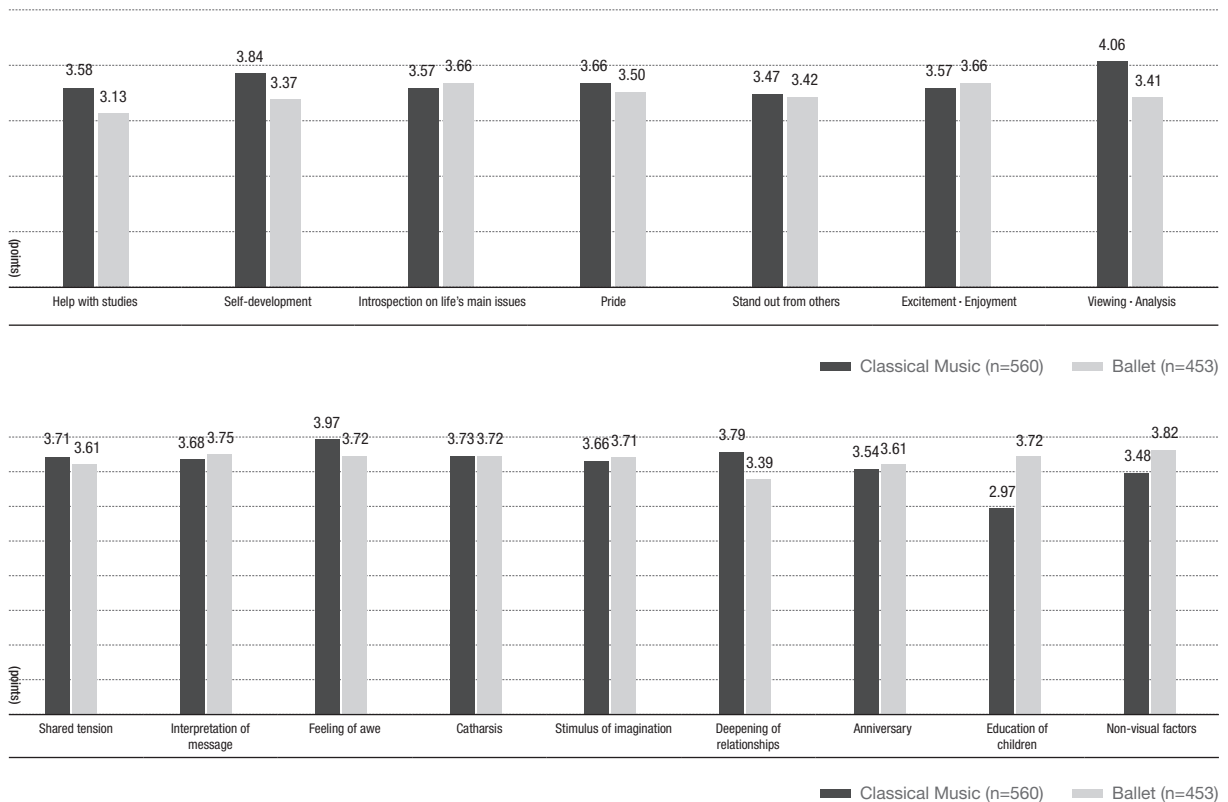
Figure 3-3 Selection of Performances



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



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

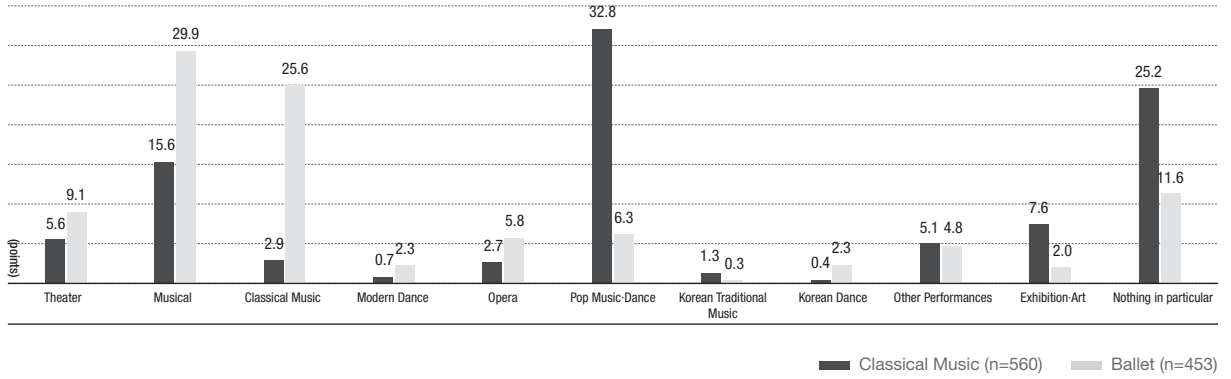
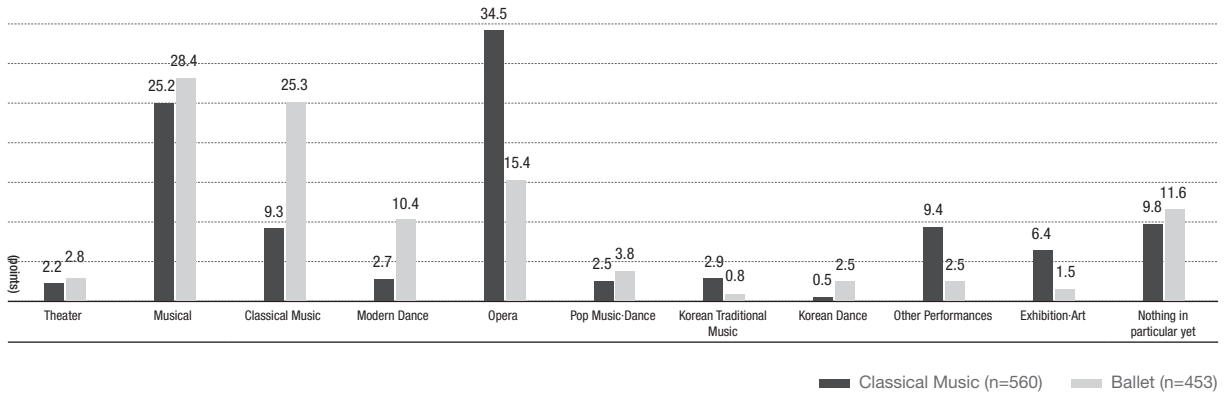
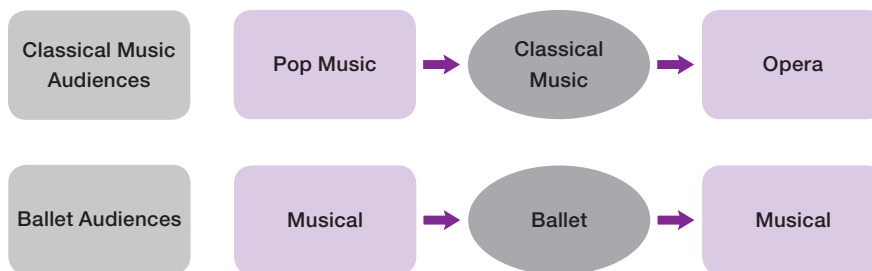


Figure 3-6 Preferred Genre after the Development of Taste for Cultural Activities



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

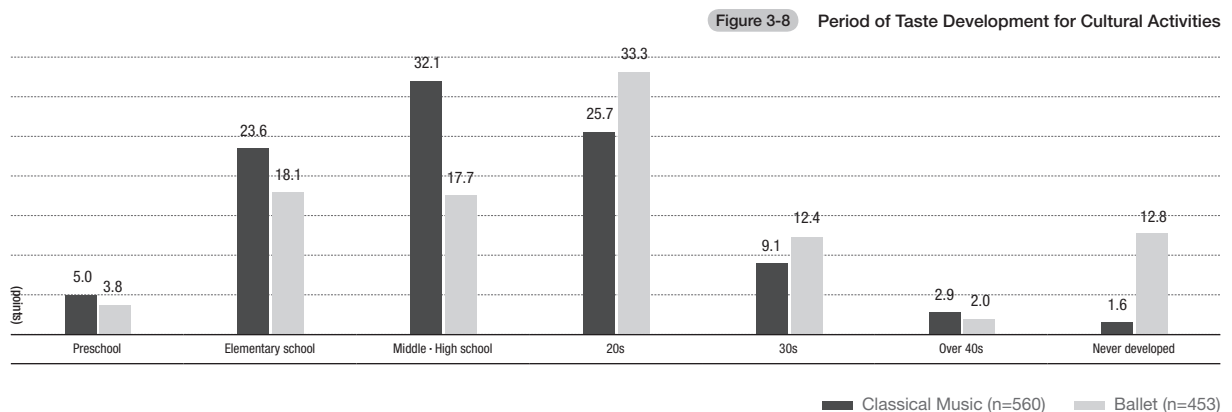


2. Development of Taste for Classical Music and Ballet Attendance

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

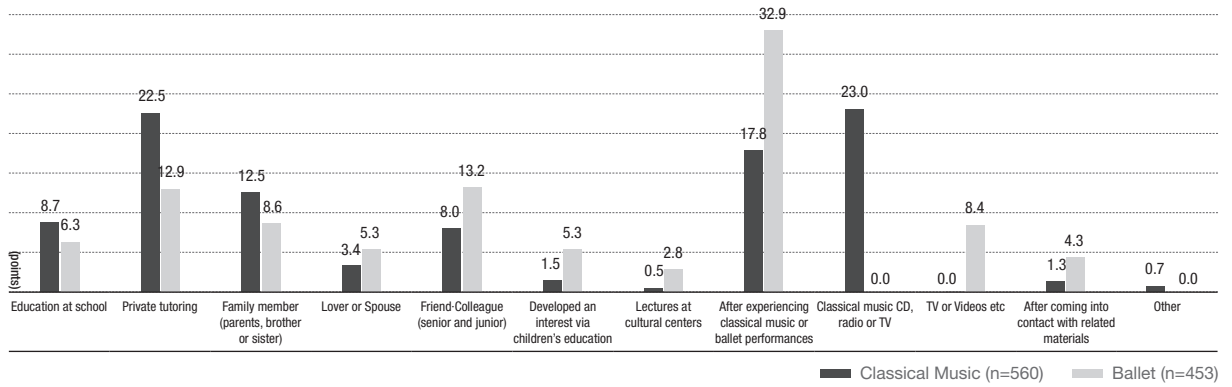
Differences were also uncovered in terms of the period in which the taste for classical music and ballet was formed. The most commonly given answer among classical music audiences with regards to the formation of their taste for classical music was during 'middle and high school' (32.1%); this was followed 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.



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%).

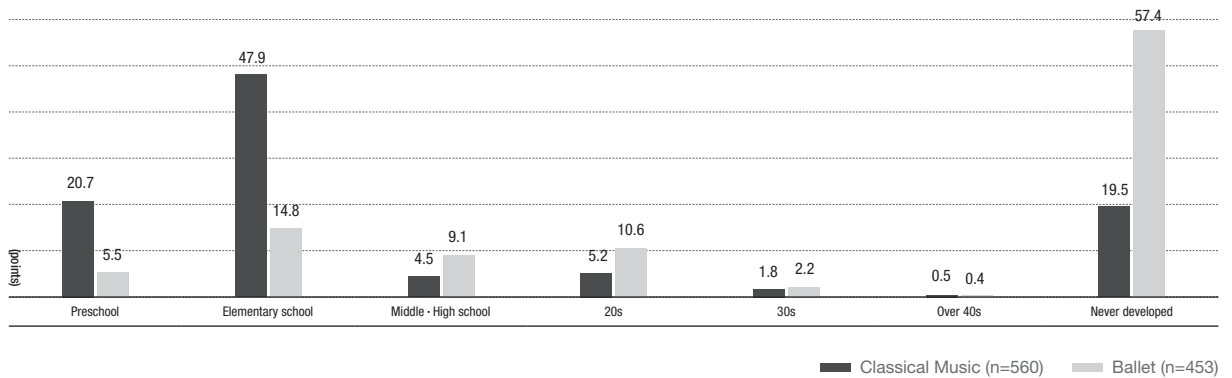
Figure 3-9 Factors behind the Development of Taste



3) Education Period

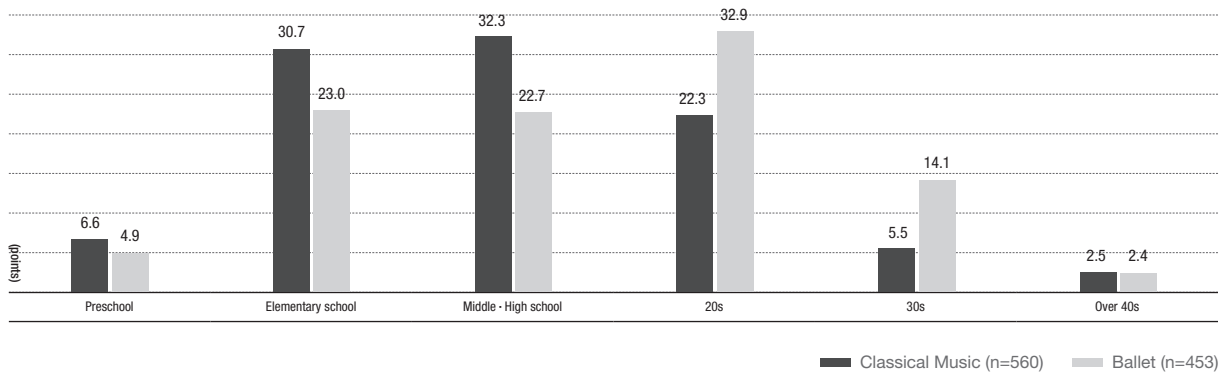
In fact, classical music audiences exhibited higher degrees of relevant education than ballet audiences. 80.5% of classical music audiences received related education. The main periods in which such education began were during preschool (20.7%) and elementary school (47.9%). Meanwhile, a great number 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



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



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 how 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 there 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
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

2010 Survey of Classical Music and Ballet Audiences (based on 2009)

Korea Arts Management Service

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