

## Chapter 3

# ***Growing Generation Z audiences: Untapped audiences of Chinese Instrumental Music in Singapore***

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### **Introduction**

Vital to the traditional arts in multicultural Singapore, Chinese instrumental music is compelled to “adapt in a way that it keeps its identity and yet becomes part of the present” (Thumboo 2020, 8). The preservation of traditional art forms is critical as it defines the nation’s distinctive identity.<sup>1</sup>

While the arts in Singapore find new ways to propel in a new pandemic world, traditional arts consequently too, face increasing challenges in withstanding the currents of modernisation (Quek 2020, 29). Attracting new audiences amidst the current backdrop of digitisation is a priority for Chinese instrumental music companies. Generation Z (Gen Z) are soon to be the most populous generation as they are accountable for more than one-third of the global population of 7.7 billion (Deloitte 2019, 22). Specified as those born after 1995, Gen Z will eventually be key stakeholders of the arts as the generation grows and matures as audiences and patrons.<sup>2</sup>

Chinese orchestral music is currently “undermined by its stereotypical conception as a second-rate musical genre” as compared to Western music (Wong and Fu 2021, 275). With the ethnic label of “Chinese” music, the artform bears a stigma of being “backwards” by the majority (ibid.), and the words “Chinese” and “traditional” carry

<sup>1</sup> National Arts Council, “Arts Master Plan Annex E”

<sup>2</sup> National Youth Council “Generation Z”

a negative connotation of being “out of date”, “old fashion” and “uncool” within mainstream cultures (Quek 2021, 33). The problem lies with appealing to Gen Z, who has entirely different habits and understandings as compared to millennials or preceding generations (MediaOne n.d.). The 2017 Population Survey on the Arts further confirms the unfavourable plight of the scene as only seven per cent of the Student demographic, encompassing Gen Z, of the survey attended a Traditional Ethnic Music event, rendering it inferior to 3 other genres – Popular, Rock, Indie/ Alternative Music, Western Classical Music and Vocal Music.<sup>3</sup> To enhance participation among external audiences, Chinese instrumental music organisations have to overcome perceptual barriers of and attitudes and perception of being backwards in nature. As long as audiences view the arts as “exclusive, elite, abstract, or otherwise not related to their lives,” they will not be inclined to participate (McCarthy and Jinnett 2001, 33).

However, with the support of the government, community and individuals, Singapore’s Chinese instrumental music scene went through a search for a unique Singaporean Chinese music identity in the past decade. Fresh experiments and endeavours ensued as musicians of the scene contributed to this new movement (Quek 2020, 28).

The National Arts Council’s Traditional Arts Plan, initiated in 2011, was committed to improve excellence of productions, growing new strong companies as well as to increase audience base and accessibility to traditional arts. The plan pathed the way for the development of younger Chinese music companies to conceive impactful new identities in traditional Chinese music.<sup>4</sup> Today, national orchestra Singapore Chinese Orchestra (SCO) and two younger Chinese instrumental music companies that reside under the auspices of Singapore’s National Arts Council’s Major Grant Scheme - Ding Yi Music Company and The TENG Company - are the largest financially and in size. Together the three organisations are recognised as the market leaders in Singapore for Chinese instrumental music.

The emergence of these new Chinese instrumental music companies, alongside national orchestra SCO, signifies an organic growth of the scene (Heng 2020, 240) and is being updated to retain its power and relevance (Thumboo 2020, 8). These new companies diversify the scene as they explore a fresh variation of music as they do not restrict themselves to the orthodox Chinese orchestral format (Heng 2020, 239).

Arts institutions are constantly seeking ways to “increase public’s access and exposure to their activities” where a strong focus on audience development has emerged

<sup>3</sup>National Arts Council “2017 Population Survey of the Arts”

<sup>4</sup>National Arts Council, “Arts Master Plan Annex E”

(Walmsley 2019, 153). As the life-blood of the performing arts (*ibid.* v), audiences are crucial for Chinese instrumental music companies in Singapore. At 17.5% of Singapore's population and the first generation that has never known a world without cyberspace and internet connection (Deloitte 2019, 4), Gen Z is a generation that is unlike any other (Manjur, n.d.). Gen Z are now conquering the market and setting new standards– forcing change in every industry (PwC 2020, 5).

Like Millennials and younger generations today, it has been uncovered for Gen Z to have very different habits and expectations as compared to older audiences (Puah 2020, 37). Large research bodies worldwide have been attempting to understand the generation to predict its impact on the economy collectively. These studies provide relevant findings aligned with the research objectives of uncovering the music and consumption habits of Gen Z. An understanding of pertinent motivations can help the arts identify target markets and how best to communicate with audiences (McCarthy and Jinnett 2001, 35).

Findings of a study done by PwC Europe (PwC) constructed insights to understand how young consumers think and behave (PwC 2020, 4). Based on a 10,000 respondent survey of consumers in Europe with 2000 Gen Z respondents, PwC's research found the younger generation to be more "tech-savvy" and demanding than any other generation (*ibid.*, 5). In a mobile-first environment with perpetual access to the internet, it is unsurprising that extensive technological advances today allows increased connectivity with the world and has resulted in new forms of consumer behaviour (*ibid.*, 5 and 18).

Key insights show that convenience is key for Gen Z consumers who "demand technologies that can be tailored precisely to individual needs" (PwC 2020, 7.) "On Demand" is a key term when dissecting this generation (*ibid.*, 31). Watching videos, TV or movies and listening to music on demand is now essential for young consumers (*ibid.*, 28). This form of evolving technology permits individuals to control personal entertainment experiences and is common to hear about consumers "curating" what and when consumers engage in (Byrnes 2015, 166).

PwC's research also found that 95% of Gen Z consumers use social media daily (2020, 11). Around one-third of the respondents rely on new media or social media platforms to stay up-to-date about current affairs (*ibid.*, 31). In the Singaporean context, it was highlighted in the National Arts Council's 2017 Population Survey on the Arts that social media was the main source of information on the arts among Students, a demographic

that encompasses Gen Z, while older generations are engaged better via traditional media. Large bodies and key players of Singapore's art scene like The Esplanade have made adjustments in an attempt to engage this digitally savvy generation.<sup>5</sup>

In today's pandemic world, it is necessary to understand how this emerging cohort makes choices to communicate as it allows Chinese instrumental music companies to engage and develop Gen Z audiences. Without the understanding of relevant motivations and touchpoints of a generation, it is difficult for arts organisations to identify who is likely to be inclined toward their organisation and how best to convey their message (McCarthy and Jinnett 2001, 35).

### Research Methodology

Conducted in 2020-2021 in the midst of the COVID-19 pandemic, this study used a mixed-method research approach with a combination of both qualitative and quantitative methods. The study seeks to discover means and methods for Chinese instrumental music companies to develop Gen Z audiences. The use of more than one research approach increases confidence in the findings through the confirmation of a proposition with multiple measures (Heale and Forbes 2013, 98). The research was conducted in four phases (Figure. 1) comprising both primary and secondary data collection.

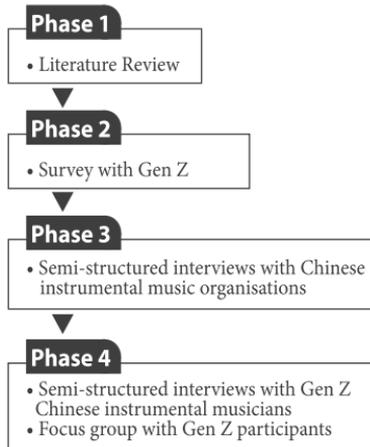


Figure 1. Four-phase research design

<sup>5</sup>National Arts Council "Population Survey of The Arts", 2017

*Phase 1: Literature review*

Literature was combed in the initial research stages of the study as there is scarce published research on topics and subjects surrounding Singaporean Chinese music.

*Phase 2: Survey on Gen Z*

To assess and understand the Singaporean Gen Z population, an electronic survey was developed next to gather quantitative and qualitative data through a mixture of close and open-ended questions. The sample pool defined were Singaporeans or permanent residents of Singapore aged 16 to 25, which mimics significant consumer market research.

The survey was circulated digitally to Gen Z individuals, through social media and relied on the snowball sampling method. The survey concluded with 96 responses with only 12.5% of respondents having identified as avid Chinese orchestral music listeners. 83% of the sample were Students with the remaining 17% being National Service Men or Working adults. 58.3% of the respondents were Females, 40.6% Males and 1% identified as Non-Binary. The racial composition of the respondents were 76% Chinese, 12.5% Malay, 7.3% Indian and 5.2% others.

For purposes of this study, the words CO music was used as an umbrella term in the survey to represent all forms of Chinese instrumental music which includes Chinese orchestras, Chinese chamber music and Chinese instrumental solos. The term Chinese orchestra music (or CO music) is, while not accurate, colloquially used to signify all forms of Chinese instrumental music in Singapore.

*Phase 3: Interviews with Chinese instrumental music companies*

In-depth interviews were conducted with management of the three major Chinese instrumental music companies in Singapore.

Interviews were conducted with: June Teo, Assistant Director for Marketing and Communications of SCO; Elvia Goh, General Manager of Ding Yi Music Company and Yang Ji Wei, Executive Director and Co-Founder of The TENG Company.

*Phase 4: Focus Group and Interviews with Singaporean Gen Z musicians*

A multi-racial focus group of four Gen Z participants who did the survey in Phase 2 and agreed to be contacted for further research was conducted. The group consisted of two Chinese, one ethnic Malay and one ethnic Indian. Interviews with Singaporean Gen Z Chinese musicians were also conducted.

Phase 4 discussions benefited from themes and issues that surfaced from the previous interviews and survey in Phases 2 and 3. Themes that surfaced in the earlier phases included: 1) Chinese instrumental music's form and format, 2) Chinese instrumental music's accessibility and distribution and 3) the impact of the pandemic on Chinese instrumental music in Singapore.

The Gen Z Chinese musicians interviewed were: Calista Liaw an Erhu player who currently studies music professionally in National University of Singapore; Jonathan Ngeow a young professional Ruan Musician and Ryan Lim, an Erhu player and current co-concertmaster of the Singapore National Youth Chinese Orchestra.

The research design allowed for systematic analysis to occur progressively where qualitative material were able to be synthesised alongside quantitative findings.

## Findings

### *Pop music is the overwhelming genre of choice of Gen Zs*

Since the rise of globalisation, perimeters have been blurred between music genres. Having been exposed to an abundance of non-conventional traditional music performances of altered styles and languages from a young age (Quek 2020, 22-23), it is typical for Gen Z to listen to a variety of genres.

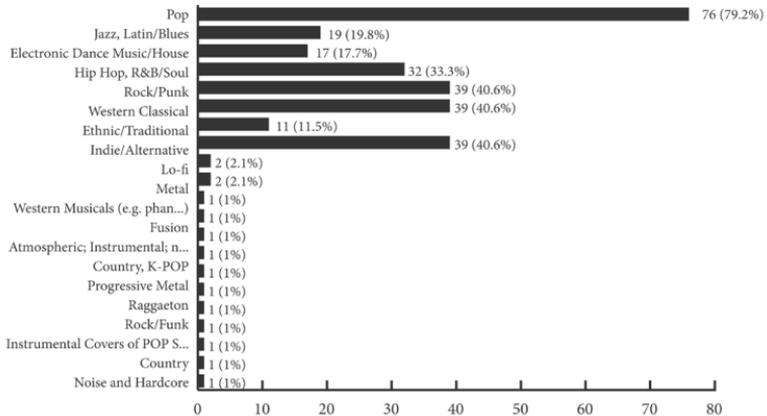


Figure 2. Survey results for music choice of Gen Zs

Figure 2 shows the findings of our survey. Pop music emerged as the top genre choice of Gen Z in our survey, selected by a whopping 79.2% of respondents.<sup>6</sup>

### ***Gen Zs are not targeted by Chinese instrumental music companies***

Teo from SCO explains that Gen Z are not the main target audience of Chinese instrumental music companies in Singapore, with their current target audiences aimed at older demographics.<sup>7</sup>

Ding Yi Music Company programmes its shows to target Chinese instrumental music lovers that fall in the demographic of middle-aged and above. The company also conducts programmes that reach out to younger students and children.<sup>8</sup> Ruan musician Ngeow identifies a gap in audience captivation efforts by Chinese instrumental music companies, saying that Gen Z audiences are usually overlooked.<sup>9</sup> Most Chinese instrumental music companies do not have programmes that are catered towards the Gen Z population currently and this could be detrimental for sustainability in the future.

Current marketing and publicity efforts of most Chinese instrumental music companies revolve around traditional media outlets and traditional platforms. Erhu player and co-concertmaster Lim revealed that even though traditional media still has some presence, it currently has little impact on Gen Zs.<sup>10</sup> According to SCO's Teo, the orchestra primarily publicises events in local Chinese newspaper, Lianhe Zaobao and various Chinese music radio stations which are not relevant to Gen Z.<sup>11</sup>

### ***Mismatching perceptions between Singaporean Gen Z on Chinese instrumental music and Chinese music companies on Gen Z perception***

The words “Chinese” and “traditional” carry a negative connotation of being “out of date”, “old fashion” and “uncool” within mainstream cultures (Quek 2020, 33). Ding Yi's Goh says that the company struggles to compete with Western influences. She bemoans, “there tends to be a harder way of getting [Gen Zs] to accept Chinese culture rather than a Western culture... I think from the onset that's really a challenge”.<sup>12</sup>

SCO's Teo expressed that Classical music is unpopular in Singapore, and Chinese instrumental music companies have it worse due to the traditional sound, instruments and compositions.<sup>13</sup>

<sup>6</sup> Research Survey, January 2021, Singapore

<sup>7</sup> June Teo, Personal Interview, February 2021, Singapore

<sup>8</sup> Elvia Goh, Personal Interview, February 2021, Singapore

<sup>9</sup> Jonathan Ngeow, Group Interview, February 2021, Singapore

<sup>10</sup> Ryan Lim, Personal Interview, March 2021, Singapore

<sup>11</sup> June Teo, Personal Interview, February 2021, Singapore

<sup>12</sup> Elvia Goh, Personal Interview, February 2021, Singapore

<sup>13</sup> Elvia Teo, Personal Interview, February 2021, Singapore

Ngeow mentioned that most people have the perception of the music being “loud and noisy” and people still understand Chinese instrumental music as Chinese traditional music from a few decades ago.<sup>14</sup> Additionally, Lim expressed that he is apprehensive and finds it a challenge to disclose his passion in Erhu and status as a Chinese instrumental musician to his peers because he is concerned about the negative reactions and stereotypes of his peers.<sup>15</sup>

Select the option that applies to the following negative “Chinese orchestral music is...” statements

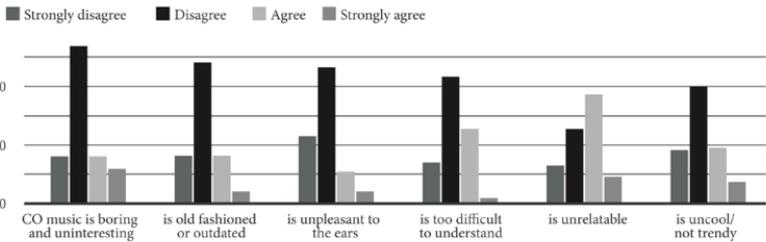


Figure 3. Survey results on negative statements of Chinese instrumental music

Select the option that applies to the following positive “Chinese orchestral music is...” statements

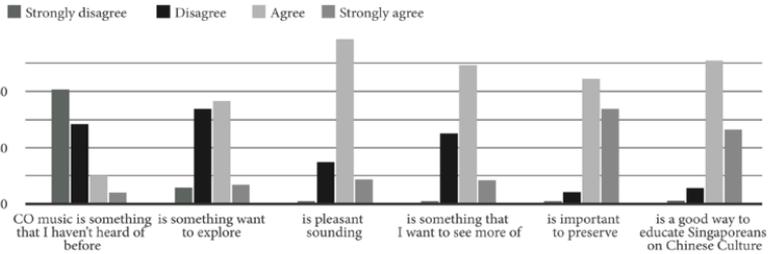


Figure 4. Survey results on positive statements of Chinese instrumental music

However, in our survey among Gen Zs, it was found that there is a disconnection between the impressions that Gen Zs have of Chinese instrumental music and the impressions that the Chinese musicians and companies have of Gen Zs.

Likert scale questions were posed in the survey to understand perceptions of the art form, in which respondents were asked to rate negative and positive statements concerning Chinese instrumental music. Results convey that Gen Zs are receptive with positive perception of Chinese instrumental music generally. In Figure 3, results

<sup>14</sup>Jonathan Ngeow, Group Interview, February 2021, Singapore

<sup>15</sup>Ryan Lim, Personal Interview, March 2021, Singapore

show that most respondents agree and strongly agree that the music is not relatable. This finding could possibly hold the key to growing the Singaporean Gen Z audience. Respondents also disagreed with the rest of the negative statements such as “the music form is old fashioned or outdated or the music is boring and uninteresting”. Positive statements in Figure 4 were generally agreed with. There is a mismatch in perceptions between the views held by the Chinese music companies and practitioners and the Gen Z surveyed.

### ***Reaching Singaporean Gen Zs and how they search for new music***

Byrnes emphasises that the heightened focus with “any-time digital consumption” creates an audience that does not recognise traditions related to how arts organisations perform or deliver their content (2015, 166). As a “social generation”, it is typical for Gen Z to document and share enhanced social experiences on digital platforms for the global audience (MediaOne n.d.). In PwC’s research, one-quarter of Gen Z respondents stated that they have been influenced by influencers or celebrities (2020, 31). To reach out to digital natives, PwC urges media companies to focus on personalised and on-demand distribution, combining a “solid social media presence” to attract consumers as they expect a seamless connection across all touchpoints and a consistent customer experience (ibid., 19).

The diversification of digital efforts to reach out to audiences could potentially be a gateway for Gen Z. Our focus group discussions revealed that influencer marketing is prevalent among the generation, and the group views influencer marketing as a major sales-driving factor for companies.<sup>16</sup> Participants in our focus group expressed that they have been influenced by celebrities and influencers on social media platforms and observed that their peers behave similarly as well. Additionally, influencers’ content is more relatable as it is not viewed to be as exclusive as celebrities; such content has a higher impact on Singaporean Gen Zs.<sup>17</sup>

Yang from The TENG Company shared that it is currently enhancing its marketing capabilities and has expanded its marketing team to specifically work on content creation for social media.<sup>18</sup> Similarly, SCO is currently venturing into influencer marketing but is unsure of the efficiency of it as there are very few “special influencers” who are relevant to Chinese instrumental music.<sup>19</sup>

As a result of COVID-19, Singaporean Chinese music instrumental companies have been forced to grow their online efforts - essential to stay relevant in this digital

<sup>16</sup> Brenda Poh, Mikko Neo, Raesmi Nambiar, and Ernie Martha, Focus Group, February 2021, Singapore

<sup>17</sup> ibid.

<sup>18</sup> Yang Jiwei, Personal Interview, February 2021, Singapore

<sup>19</sup> June Teo, Personal Interview, February 2021, Singapore

age. All organisations interviewed currently are on major music digital streaming platforms and are releasing music periodically. Goh shared that Ding Yi Music Company is currently trying to “reach as many kinds of different channels...those different channels also have a different base as well”.<sup>20</sup>

The pandemic is presenting an opportunity for Chinese instrumental music companies to engage with digitally native Gen Zs. The Gen Z audience however, can only be harvested if digital outreach is done strategically.

As Gen Z’s experience of life is far broader than previous generations (Kolb 2000, 26), the rise of the internet with a plethora of avenues online means Gen Z no longer look to a single disposition for cultural meaning or entertainment. Kolb expresses that the young population residing in this multimedia and cross-cultural climate would prefer performances that feature “music combined with other art forms and which use modern staging techniques” (ibid.).

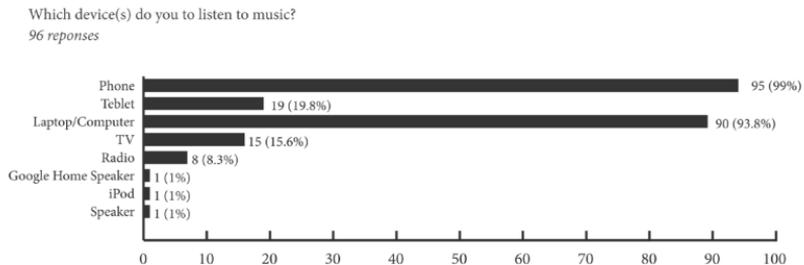


Figure 5. Survey results on preferred platforms for music consumption in Gen Z

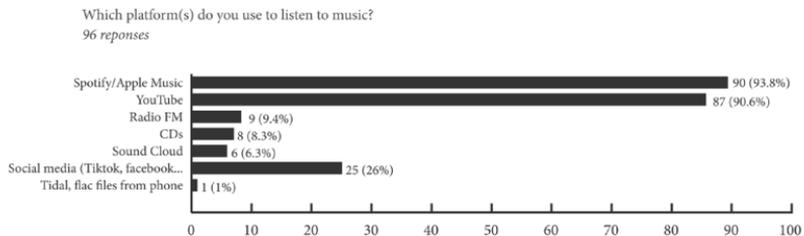


Figure 6. Survey results on preferred devices for music consumption in Gen Z

<sup>20</sup> Elvia Goh, Personal Interview, February 2021, Singapore

Our survey results show that a large majority of Gen Z respondents use digital devices such as phones and computers to consume music via major music streaming platforms such as Spotify and Apple Music, as well as video streaming platform, YouTube. Music videos and digital concerts are a common sight on social media pages of music organisations in Singapore.<sup>21</sup> However, not all online Chinese instrumental music content gains traction. SCO has also been releasing free-for-all sessions of past concerts performed in the last few years on social media in times of COVID-19 but to lukewarm results.<sup>22</sup>

The impact of an abundance of free-for-all content residing on social media is detrimental as it affects the performance of ticketed digital events. Teo warns that excessive release of music content could be a “double-edged sword” as it renders ticketed digital concerts obsolete.<sup>23</sup> Teo also observed that individuals are not ready to pay for digital concerts which is an issue faced across the arts sector in Singapore.<sup>24</sup>

Our survey and focus group participants show that a large majority of Singaporean Gen Z use public transport and they consume music most when they are commuting.<sup>25</sup> Other studies have also shown that Singaporean Gen Z consumers are used to public transport and value their journey time for communication and entertainment – which means that seamless connectivity is a key feature for Gen Z while commuting (PwC 2020, 16). These findings emphasise that the ability to harness the time around transportation commutes could be a possible touchpoint for Chinese instrumental music companies to grow Gen Z audiences.

Liaw, who commutes via public transport frequently, identified that arts groups in Singapore can tap on traditional advertising on public transport to reach out to more audiences.<sup>26</sup> She highlighted a past campaign of The TENG Company that seized the opportunity.<sup>27</sup> In a collaboration with advertising giant, JCDecaux, The TENG Company had a multitude of youth-appealing designed bus stops advertisements nationwide for over six months from 2020 to 2021.

The advertisements included a call-to-action for young commuters to scan and listen to the organisation’s curated playlist instantly on Spotify. Liaw adds that it “really makes a difference as to making music more accessible. It’s not just raising awareness, but you’re giving them direct access to your music”.<sup>28</sup> The TENG Company’s Executive Director Yang believes that even though not all young commuters may have scanned the advertisement, it would serve as great brand recognition for TENG amongst Gen Zs.<sup>29</sup>

<sup>21</sup> Research Survey, January 2021 Singapore

<sup>22</sup> June Teo, Personal Interview, February 2021, Singapore

<sup>23</sup> *ibid.*

<sup>24</sup> *ibid.*

<sup>25</sup> Research Survey, January 2021, Singapore

<sup>26</sup> Calista Liaw, Group Interview, February 2021, Singapore

<sup>27</sup> *ibid.*

<sup>28</sup> *ibid.*

<sup>29</sup> Yang Ji Wei, Personal Interview, February 2021, Singapore

Chinese instrumental music companies need to diversify to multiple digital platforms strategically to allow them to stay relevant to younger generations. Focus group participants shared that TikTok is a popular avenue for Gen Z to be exposed to new music due to its form of content and that Gen Zs have moved past online platforms like Facebook.<sup>30</sup> Survey participants also divulged that social media is vital for Gen Z to find new music. Due to an individual's high level of usage, one is likely to learn about new releases through social media.<sup>31</sup>

### ***Gen Zs relate better to Fusion Music***

Our survey has also found that Gen Z would like to see Chinese instrumental music fused with other popular genres to make it more relatable. 21.7% of survey respondents believed that the Chinese instrumental music genre had the potential to “merge with other genres”, “make soundtracks”, be “contemporised” and “be incorporated with pop”.<sup>32</sup>

Lim articulated that the infusion of Chinese instrumental music elements in pop music or rap music would be a “stepping stone to reach younger generations” due to the high listenership of contemporary genres.<sup>33</sup> Ngeow suggests that collaborations with artists who are popular and well-known in mainstream media are on the rise for arts organisations.<sup>34</sup>

A focus group participant believes that collaborations with renowned celebrities is an advantageous way to market music to increase relatability and cultivate younger audiences, but the traditional legitimacy of the music is then questioned.<sup>35</sup>

The SCO however, is burdened by expectations to uphold tradition. SCO's Teo revealed that it “takes a lot of courage in terms of management” to try something new.<sup>36</sup> With purists and traditionalists who are willing to criticise anything anti-tradition, it is challenging for the orchestra to deviate from traditional forms of Chinese instrumental music. New explorations and collaborations are often done in a “very traditional way or conservative way”.<sup>37</sup> Liaw also acknowledges that Chinese instrumental musicians like herself are facing a loss of identity with the infusion of pop culture. In this 21st century, “keeping traditions is very important, but there is a need to reinvent traditions”.<sup>38</sup>

<sup>30</sup> Brenda Poh, Mikko Neo, Raesmi Nambiar, and Ernie Martha, Focus Group, February 2021, Singapore

<sup>31</sup> *ibid.*

<sup>32</sup> Research Survey, January 2021, Singapore

<sup>33</sup> Ryan Lim, Personal Interview, March 2021, Singapore

<sup>34</sup> Jonathan Ngeow, Group Interview, February 2021, Singapore

<sup>35</sup> Brenda Poh, Mikko Neo, Raesmi Nambiar, and Ernie Martha, Focus Group, February 2021, Singapore

<sup>36</sup> June Teo, Personal Interview, February 2021, Singapore

<sup>37</sup> *ibid.*, 13-14

<sup>38</sup> Calista Liaw, Group Interview, February 2021, Singapore

## **Conclusion**

New opportunities and new threats emerge in the marketplace every day (Byrnes 2015, 441), as the world battles a pandemic. Marketing to Gen Z requires a full understanding of the generation. As seen from the findings above, long standing perceptions by Chinese music companies may not hold true for Gen Z. Engaging with Singaporean Gen Zs begins by reaching out to them and creating artistic offerings with them in mind. Fusion genres could be a suitable entry-point for Gen Z to appreciate Chinese instrumental music. Programmes can be tailored to suit the tastes of young audiences with the support of strong teams in management, programming and marketing (Quek 2020, 35).

With resolution, the power of tradition is also strengthened when it adapts and keeps relevance (Thumboo 2020, 8).

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