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The Creative Aspect of Country Branding
– How Music Is Able to Influence the Country Image in Case of Hungary

Az országmárkázás kreatív aspektusa – miként képes a zene befolyásolni az
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1. Introduction

Musical rhythm is in our first heartbeat and it follows us in every moment in forms of communication, entertainment and learning. “Music is a fundamental channel of communication: through music people can share emotions, intentions and thoughts even though their spoken languages may be mutually incomprehensible.” (Hargreaves – Miell – McDonald, 2002) It can be a supporting baseline, which helps people and skilled composers to find their way to express their deep and profound emotional life and imagination.

In fact, music is present in our lives everywhere playing a greater part than ever before. The rapid technological development made it possible to listen to music every time and everywhere through the commercialization and economic power of music. Different appliances have been invented in a more and more inexpensive way to enjoy the rhythms of music: vinyl, walkman, CD, Internet, MIDI interface, video recorders and nowadays iPod and mp3 players expanded the ways in which people experience music – a musical person can act as a consumer, fan, listener, composer, arranger, performer or critic – all diverse roles have been opened to us nowadays to express our identities and being a member of our wished reference group.

But how is music connected to country branding and nation image? The answer is quite simple: music can be a source of a wide range of associations. When we listen to a song featuring a country’s original characteristics, the nation itself pops into our mind with all of its typical symbols, inhabitants – briefly the image of a country. When flamenco is played we cannot avoid imagining the passionate dancing movements, temperamental women and men, moreover the associations of bullfights. When one plays the bagpipe we are picturing gentlemen in Scottish skirt, as long as accordion reminds us of the background music during French movies, so Paris and specific French cuisine.

As a presumption of my paper music affects the reputation of countries as playing a crucial role in the cluster of creative class (Florida, 2002). „The **creative class** is a fast-growing, highly educated, and well-paid segment of the workforce on whose efforts corporate profits and economic growth increasingly depend” (Florida, 2002 p. 64.). Members of the creative class are involved in a wide variety of work in different industries – from technology to entertainment, journalism to finance, high-end manufacturing to the arts. In the economic crisis innovative ideas and especially creative ideas are needed to engage in reforms in my opinion, the presence of creative class has to be scrutinized in the matter of country branding

as well. Zenker (2011) highlights the importance of creative class in country branding marking it as a relevant target group from the resident point of view.

But music is just one element of a nation's culture, which plays a crucial role in a country's image. Indeed, the examination of culture can give the mutual cross-section of music and country image. Besides music there are several defining elements of culture like religion and beliefs, language, clothes, theatre, cinema and so on. However, culture and especially music plays a crucial role in countries' lives, because it frames the basic awareness of national identity, nationalism and patriotism.

The key question in my paper is how music is able to influence the country image. In the following, this question is divided into sub questions identifying narrower subfields of the topic. The main objective of my paper is to uncover the linkage between music and country image and to draw a model based on Anholt-hexagon (2003) that can be used by practitioners as well. Therefore I will review the relevant literature in this field focusing on the creative class (Florida, 2002) and their connection to each other. The paper's novelty lies in the synthesis of theoretical approaches, which were not applied and connected to each other before according to my secondary research. Nevertheless, the topic's nature requires several examples from practical life as well: I analysed different international and Hungarian case studies where it was applicable. For distinguishing the practical examples I enhanced them with separate boxes in order to support the relevance of theoretic approach.

Because of the novelty of the topic it was necessary to collect primary data besides secondary ones. Therefore, I conducted in-depth interviews with experts from the music industry, focus group interviews with visitors and I designed a questionnaire in order to gain quantifiable data from visitors especially in case of Hungary. During the primary research I applied different creative techniques (combining audio, visual and audiovisual elements) in order to identify the main associations of respondents. In the primary research part the Hungarian focus from a practical point of view is enhanced, especially because there is no direct literature available on this topic. As a result, I will demonstrate the Hungarian Musical Country Image in Chapter 5 followed by some suggestions in Chapter 7 how to improve country image strategy built on music.

2. Research statement and methodology

During my essay I will answer the following **questions**:

- Q1: What is the cultural aspect of country branding in today's economy?
- Q2: How can the creative class build competitive advantages for country branding?
- Q3: What are the main platforms of musical nation image?
- Q4: How can music influence the nation image in terms of Anholt-hexagon?
- Q5: Does Hungary have a musical nation image?
- Q6: How can Hungary improve its musical nation image?

For answering these research questions I used the following **presumptions**:

- 1: Cultural value is more and more important in today's economy.
- 2: The creative class contributes to the competitive advantages of a country in several ways.
- 3: One of the most important musical platforms is the digital one due to the digital shift in the music industry.
- 4: Musical nation image can be drawn based on the concept of Anholt-hexagon.
- 5: Hungary unfortunately does not have a steady and strong musical nation image.

During the research two main perspectives are applied: exploratory and descriptive research. **Exploratory research** helped me to define the problem, determine the best research design, data collection method and selection of subjects by applying secondary research such as reviewing available literature and data, besides qualitative approaches such as in-depth interviews, focus groups, projective methods, case studies. During the **descriptive research** I collected quantifiable data for further generalizations for the given population.

In the research method I differentiated three phases depicted on Figure 1. First of all, by **secondary research** I analyzed and synthesized the literature background of country branding and culture, the phenomenon of creative class and its possible relation to each other. In the **primary research** I focused on questions could not be answered directly after my secondary research. During **qualitative research** phase I conducted in-depth interviews with practitioners and focus group interviews with visitors. As part of the **quantitative method** I designed a survey to get some quantifiable insights from visitors in the field of country and music, especially in case of Hungary. The detailed methodology will be depicted in Chapter 6.

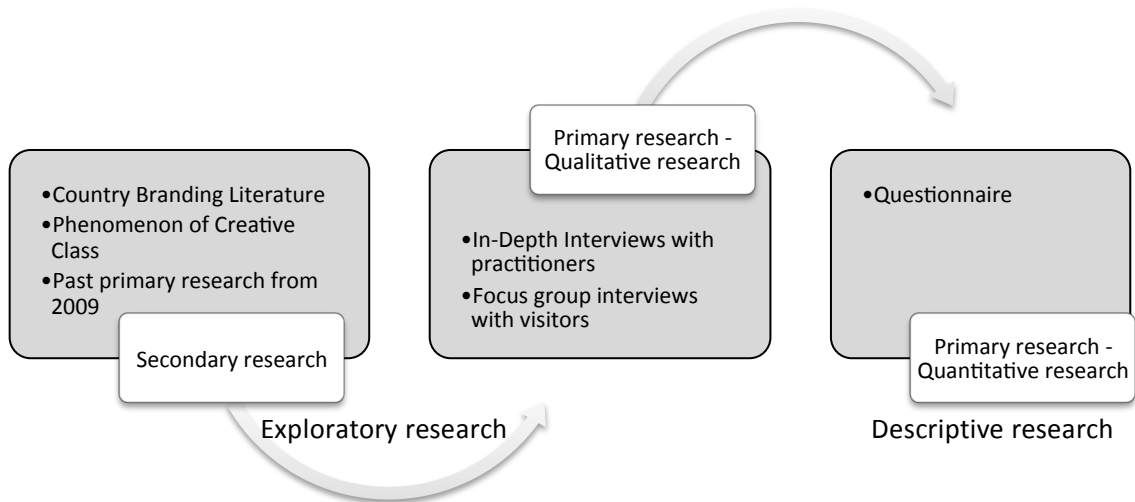


Figure 1. The Research Method

Source: Author's edition

3. Literature background

In this chapter I will demonstrate the key terms and definitions of my research area from different dimensions and aspects in order to synthesize the various perspectives. The following terms will be touched: country image, country and place branding, creative class, cultural diplomacy. But why did I turn my focus on the previously mentioned terms? In the following subchapter I will demonstrate the reasoning of my choices among the examined topics.

3.1. INTRODUCTION TO THE MAIN LINKAGES BETWEEN TERMS

The cultural aspect of country image is irreplaceable and unique, which is connected to the country originally. But how the different terms chosen to approach the topic are connected to each other in the dimension of culture? In this subchapter the main linkages between concepts and their connection to each other will be revealed what helps the reader to understand the musical aspect of nation image.

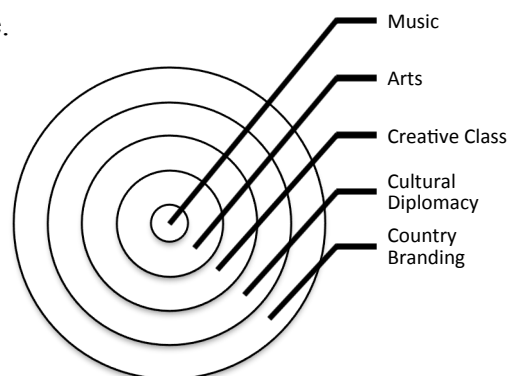


Figure 2: Linkages between Terms

Source: Author's edition

On Figure 2 different interconnection points are depicted which shows that music, art, so the creative class, moreover cultural diplomacy is one of the components of country branding. Musicians are part of the favoured target group of artists who are labelled as opinion leaders in music branding environment according to Ákos Takács, Culture Manager at Red Bull Corp. (See Chapter 6.3.2.). To the Creative Class (Florida, 2002) other members are added as well from the population who create value and able to replicate those innovative solutions on a long term. But the nature of music is to connect these areas with cultural diplomacy as well: music is able to embrace people from different cultures in order to achieve one common aim; besides music is a universal common language that can be received and interpreted by anyone. So cultural diplomacy influences the education system of a country from a domestic perspective, as long as it has a crucial effect on how a given country is evaluated in an international environment.

The first example of modern cultural diplomacy is connected to music. In the cold war around 1956, the American jazz artist, Jason “Dizzy” Gillespie went for a world tour to Eastern Europe and Southeast Asia. In those years the international tense atmosphere enhanced distrust and disregarded communication in international relationships, but Dizzy Gillespie and its band highlighted the love of community and music independent from their ideological view. (Available: Official Web Page of Cultural Diplomacy. Retrieved: 2012 March)

The traditional countries implementing cultural diplomacy are U.S., UK, Canada, France, Sweden and Finland where music culture is more developed than in any other nations. Several studies revealed which analyzed the relationship of democracy and music indicating that music had a powerful effect on the formation of democratic countries. (Woodford, 2005; Mason, 1917; Buchanan, 2006)

3.2. COUNTRY IMAGE

In the past few decades national leaders noticed the importance of country image more and more: all countries around the world using brand management techniques (Kotler and Gerner, 2002) in order to differentiate themselves, increase the revenue from tourism, encourage foreign direct investment and motivate export activities. (Papadopoulos, 2004) These perceptions are all aspects of the countries’ brands, since a major aspect of all brands is the imagery or associations that people hold about them.

“Country image means an **internal and external opinion** and view system pictured from a folk, a nation, a country; the objective and subjective psychological content of heterogenic and generalized value judgement.” (Szeles, 1998, p.124) To simplify, thus the country image means what people from a nation think about themselves and what other people think about them.

„**The sums of beliefs and impressions** people hold about place. Images represent a simplification of a large number of associations and pieces of information connected with a place. They are a product of the mind trying to process and pick out essential information from huge amounts of data about a place.” (Kotler, 1993) The country image is the sum of different beliefs, ideas, impressions which people carry in them from a country. (Kotler, 1993)

In the theoretical literature there are two different approaches of country image generating a persistent debate among academic circles (Szeles, 1998). According to the first approach country image covers an “**umbrella function**”, since its elements, components and contextual factors consist of the concrete products, brands, distinguished organizations of a given country. In this case the terms of image and identity are more or less used as the same. According to the other approach the country itself is a **diverse, complex product** that can be divided to numbers of elements. This approach enhances the view that country image is a regular product image, which has more diverse and complex characteristics as a product.

The main factors influencing country image are the following (Jenes, 2005, pp. 19-20.): geographical, natural resources, social considerations, economic-commercial factors. Other tools, organizations are playing a crucial role in developing a positive country image like embassies, international events, tourism, national PR institutions, brochures and media campaigns.

Shrimp (1993) applied the term ‘**country equity**’ referring to the emotional value resulting from consumers’ association of a country. A country’s image results from its geography, history, art and music, famous citizens and other features. The entertainment industry and the media play a particular role in shaping people’s perceptions of places, especially those viewed negatively.

In my understanding the country image consists of the **cultural values and artefacts** of a given nation, the mentality and behavioural patterns of the inhabitants, the own national products, corporations and other organisations. Through the other countries, respectively outsiders it can be completed by the international appearance, which can be manifested in the international cooperativeness, diplomacy, or in international and global events. Music plays a crucial role in these areas by connecting inhabitants with visitors and investors through the universal language of music.

3.3. COUNTRY BRANDING AND PLACE BRANDING

Every nation has its own culture accompanied by musical elements as well, but it depends on the strategic approach of country branding whether music can be a suitable factor to build a conscious nation branding strategy on. In the following I will briefly demonstrate the theory and practice behind country and place branding – referring all the same fundamental idea. Country branding and place branding are terms that help to understand the context of evaluating the opportunity of strategic music branding.

- *Destination branding*: is considered to be a synonym for tourism promotion. Anholt (2007) suggests that this concept is not based on a strategic approach of nation branding. My research does not have an exclusive tourism focus, so this term will be disregarded.
- *City branding*: Florian (2002) suggests that city branding is aimed to improve a city's image which is not a suitable approach for the paper's topic, since music is one of the national identity elements of a country, not specifically associated with one city.
- *Country branding*: according to Anholt (2007) it indicates the nation's people and inhabitants who can benefit from an improved national reputation. This approach covers a strategic view combined with an umbrella perspective of the country.
- *Place branding*: is a broader term which covers nations, regions, cities – and even towns and villages. (Anholt, 2007) Place branding/regional branding brings together the public and private sectors in an attempt to achieve similar goals (Kau, 2006) which is a crucial point of my research as well.

However, the terms are in close relationship, I will demonstrate country branding and place branding connected to the paper's relevance where country branding appears as an umbrella brand covering music as one of the national identity elements. In the meantime, place branding is involved in branding creative and cultural cities/towns such as Budapest or Pécs with the support of public sector.

Gudjonsson (2005) stated that **country branding** is when a government or private company uses its power to convince people that anyone of them is able to improve or change the image of a nation. Country branding applies the branding tools to influence positively the attitude, identity or image towards a country. However, country branding covers different areas and tools in order to form a strong brand due to the synergy effect. Those areas are touristic destinations, events, infrastructure, price, quality, safety, beauty, incentives of tourism hand in

hand with the encouragement of business and education. Tourism is an essential part of country branding worldwide. (FutureBrand, 2008)

In comparison of country branding, a new approach is developed in the phenomenon of **place branding** which is of crucial importance in forming musical destinations. Kotler (1993) used first the term with the stakeholders of cities, countries or touristic destinations and consists of the competition towards tourists, visitors, investors. According to Kotler (1993), an additional aim for place marketing is to 'promote a place' s values and image so that potential users are fully aware of its distinctive advantages' (Kotler, 1993 p.18) – even though practice tends to expose this as the only goal for place marketing activities. As a matter of fact 'place' is the physical and geopolitical place of a nation, state; a region or state; a venue of cultural and historical memories; a city with numerous inhabitants; a market accompanied by different defined characteristics; a centre of an industry; or psychological features of relations among people. (Kotler et al. 2002 p.4)

Introducing place branding (in other words: destination branding, place promotion) is a new umbrella approach of country branding, region branding and city branding. (Papadopoulos - Heslop, 2002) Later on at the start of the new millennium, the focus shifted in the direction of place branding (Kavaratzis, 2008). There are indications that place marketing is shifting its focus, from adhering to the above mentioned definition by Kotler to understanding itself as an **integrated management tool** (Ashworth - Kavaratzis, 2009). The strategic approach of place branding is connected to public relations stating that the adjustment of image is a continuous, holistic, interactive and comprehensive process and it requires much more actions than changing the logo or slogan (Avraham - Ketter, 2008). Place branding can be viewed as a complex strategic and tactical fusion of shareholder groups along with the cooperative management of communication channels, which can stimulate the responsiveness and intention towards future customers. (Allen, 2007) Anholt (2007) argues the demarcation of the term place branding and country branding, since in his opinion the area of place branding constitutes of political and international relations more than marketing relations.

3.4. CREATIVE CLASS

The relevance of the creative class is obvious: in Singapore their ratio is 48% among population, meanwhile in Hungary it is summed up to 35 %. (Florida, 2011) But who are they and what do they do as being stamped creative?

„The **creative class** is a fast-growing, highly educated, and well-paid segment of the workforce on whose efforts corporate profits and economic growth increasingly depend” (Florida, 2002). Members of the creative class are involved in a wide variety of work in different industries – from technology to entertainment, journalism to finance, high-end manufacturing to the arts. Despite the wide variety of professionalism they share common values such as creativity, individuality, difference, and merit.

According to Florida (2002) creative class consists of two components: the super-creative core and creative professionals. “The ‘**super-creative core**’ includes scientists and engineers, university professors, poets and novelists, artists, entertainers, actors, designers, and architects, as well as the thought leadership of modern society: nonfiction writers, editors, cultural figures, think-tank researchers, analysts, and other opinion-makers. They are producing new forms or designs that are readily transferable and widely useful such as designing a product that can be widely made, sold and used; coming up with a theorem or strategy that can be applied in many cases; or composing music that can be performed again and again. Beyond this core group, the creative class also includes ‘**creative professional**’ who work in a wide range of knowledge-intensive industries such as high-tech sectors, financial services, the legal and healthcare professions, and business management. These people engage in creative problem-solving by applying different perspectives.” (Florida, 2002 pp. 68-71.)

As it was cited above, Florida (2011) found that in Hungary the ratio of creative experts is 35%. It seemed to be over valued in the knowledge of Hungarian population demographics, but the profound analysis of research method gives an explanation for its acceptance. The creative class variable is based on data from the International Labour Organization (Source: LabourSta Internet) and covers the years 2004–2007. It is calculated as the share of a country’s labor force that is engaged in a higher degree of problem solving in their everyday work. “It includes occupations such as computer science and mathematics; architecture, engineering; life, physical, and the social sciences; education, training, and library science; arts and design work, entertainment, sports, and media; and professional and knowledge work occupations in management, business and finance, law, sales management, and healthcare.” (Martin Prosperity Institute, 2011) Although, the research is quite inclusive, I would suggest to accept this method, since one of the main competitive advantages of the country is the well-skilled human capital which are not overpaid in comparison to other countries according to Eurostat (2012).

But how is music related to the creative class? Music and art are key elements to attract the creative class, moreover, musicians and artists are outstanding members of the super-creative core group. Musicians are attracted to places (like London or New York) where they can easily find opportunities to thrive, be themselves and fit in, solve problems and move onto the next challenge.

3.5. CULTURAL DIPLOMACY

For modelling the effect of music on country image it is necessary to dive into the field of cultural diplomacy that is an essential part of diplomacy covering the areas of education, art and culture. In the following I will depict the term of cultural diplomacy in order to get an insight for the possible connection between music and country image.

From a historical point of view until the nineteenth century, foreign policy was frequently imposed by what is known as **hard power**, often called “gunboat diplomacy”. This meant imbalanced “use of coercion, influence, authority, force or manipulation, to change the behaviour of others in a desired direction” (Cox 1981). But after that a radical shift could be noticed by applying the term of **public diplomacy** for the first time in 1965 by Edmund Dullion from the Fletcher School of Law and Diplomacy at Tufts University. In his esteem public diplomacy meant the management of international appearance by modern states. (Leonard, 2002)

In the form of the political dimension, public diplomacy has a lot in common with nation branding by influencing general attitudes in connection with design and implementation of international politics. Besides the practice of traditional diplomacy it embodies distinguished dimensions of international relations: forming and improving public opinion by government; the interaction between private groups and interest towards other countries; appropriate communication strategy for international/global events and their political influence; the communication between communication practitioners, diplomats and reporters; the processes among nations. (Anholt, 2007)

Historically, the wars of the 20th century and the arrival of the Cold War shifted the focus from hard power more on to maintaining the **balance of power**, and for the first time the cultural sector became implicated in the projection of national power and the pursuit of national interest. So the concept of the cultural nation was born.

Cultural diplomacy is the barter of thoughts, ideas, information, art, lifestyles, value systems, traditions and other cultural aspects according to the Cultural Diplomacy Institution (2012). Furthermore, cultural diplomacy is the part of diplomacy that has interests in networking opportunities through culture, art and education. It can be viewed as a proactive process advertising national institutions, value systems and original cultural traits on a bilateral and multilateral level.

All modern foreign policies integrate cultural policies into the diplomatic mix. Political scientists rank culture as the third or fourth ‘pillar of foreign policy’ after politics, trade and (for some) defence (Mitchell 1986). Culture is now firmly “part of the business of projection of power and influence, of gaining friends and deterring enemies” (Fox, 1999). So cultural diplomacy appears as “**soft diplomacy**” built on cultural barter.

The main objectives of cultural diplomacy are the following according to the official website of the topic. Cultural diplomacy helps to substantiate the trust towards other people, which can be used for different political, economical or strategic agreements. It mediates the values of the given country and tries to change the old stereotypes connected to the policy of the country (for instance, in case of United States the words ‘aggressive’ and ‘violent’ are widely spread). In addition, cultural diplomacy strengthens the traditional values as family and trust. It builds relationships between people, which can generate political changes in the government as well. Furthermore, cultural diplomacy may reach affluent foreign communities, which cannot be reached through any other diplomatic programme. Most importantly, cultural diplomacy forms a natural platform for an effective communication among people: from the youth until the less elite social classes as well by bridging the language barriers. As a result of a successful cultural diplomacy the development of civil sphere is supported and people are educated to accept different cultures by showing them values of other countries, so it tries to avoid racist and terrorist activities.

In my definition cultural diplomacy is **one of the supporting pillars of country image** especially in the Culture element of Anholt’s hexagon patronized by different organizations, institutions (owned by state or private investors) and the government itself to promote the cultural exports of a country which activity can provide a significant growth in GDP according to the new approach of creative economy.

4. Interconnections between Literature

In order to understand the theoretical approach of the literature, the main linkages between them are demonstrated in this section. Culture is the element of country image according to Anholt (2003) as counting to one of the main dimensions of his scale. Furthermore, the economic approach of culture is analysed, since cultural goods behave from an economic perspective in a different way in comparison to other products. In addition, the connection between creative class, country and place branding are depicted in this chapter in order to identify the main challenges of building a country branding strategy based on music. The main goal of this section is that the reader could understand the interconnections of literature being relevant in musical country branding.

4.1. CULTURE AS THE ELEMENT OF COUNTRY IMAGE

The Nation Brand Index composed by Anholt (2003) is known as Anholt-hexagon. Only the content drawn on the six axes of the hexagon is published, other measurement elements of the research methodology are top secret. However, after analyzing the Anholt-hexagon it becomes unambiguous that culture is one of the essential elements of country image

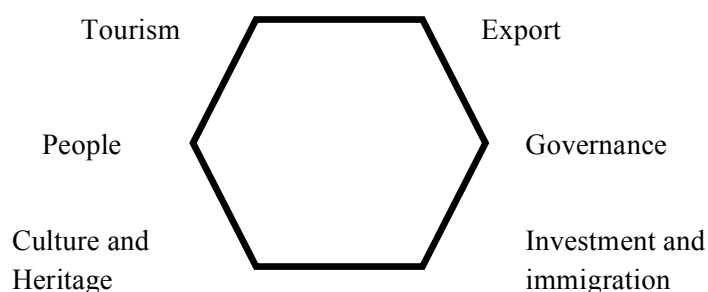


Figure 3: Nation Brand – hexagon

Source: Anholt, 2003

In my interpretation the different points of the hexagon can be explained as the following:

1. **Tourists** can experience the first impressions about the given country what is much stronger than any conscious promotion of tourism or country image. This channel is one of the most important channels in the field of country branding attracting visitors who spend their money in the host country supporting local business and increasing the annual GDP of a country. This area can be managed from a top-down approach, since touristic organizations possess remarkable amount of resources and competitive marketing practitioners.

2. The **Export** and national brands of a country are of crucial importance from the GDP point of view and of course for the reputation of a country. The ‘Made in...’ label or country-of-origin effect has a great impact how a country is evaluated which is manifested in the national export as well.
3. The **Governance**’s political decisions, if it is internationally correlated, can directly affect the population, but domestic politics can be reported in international media as well. Furthermore, the political imbalances can be reflected in the behaviour and attitude of population which already forms both internal and external country image.
4. **Investors** who are members of distinguished business groups are able to encourage foreign direct investments, recruit international talents and students. The expansion of the country’s values is pictured through international companies.
5. **Cultural activity** and cultural export may embody the field of sport, music, theatre and film, fine arts, arts and crafts, architecture etc. The different cultural export goods may affect positively, but accordingly negatively on the reputation of a country, so attention has to be favoured for this area in the future.
6. **People** living in a country are delegates of country image and not only media stars, sportsmen and artists have to be considered, but the general population, residents as well. Their behaviour of being tourists abroad and their attitude towards tourists who are visiting their home country influences the quality of a nation brand.

In my essay the fifth area, meaning cultural activity, heritage and export will be analyzed deeply, mostly focusing on the musical aspect and export of a country. The concentration of my essay is confirmed by the importance of the transforming music industry, moreover, by the extended effects of music (biological, psychological, emotional effects) on the human body. Consequently, cultural export is an essential part of country branding from a business aspect and an anthropological point of view.

4.2. THE ECONOMIC APPROACH OF CULTURE

This subchapter associates art, culture with commerce and business strategies by following the view of Andy Warhol “*the ultimate in art is the art of business*”. (Warhol, in Curried, 2007) Historically, art and culture have always been associated with commerce by the expression of economic power, especially in western cultures.

Culture contains numerous dimensions like psychological, philological, social and political ones. In the following the political and economic dimension will be scrutinized focusing on the cultural sector in parallel with the topic's relevance. Ideally, culture has economic and political dimensions as well, since it has export goods and other cultural products increasing the GDP of a country. It affects the lives of the population by applying cultural education and diplomacy creating not only welfare, but embodying social welfare.

Products in the cultural sector have usually short lifecycle (in particular in ICT sector) accompanied with high risk. Collaboration in research and development is essential to share costs in a fast-paced economy. Cultural products are targeted for local audience by using different languages, but fitting into the global competition of foreign products. The market system of cultural sector, especially in fields of cultural industry is much more complex and elaborate. The market is extremely ambiguous depending on the latest fashion, trends and consumer uncertainties (cinema and music mostly).

However, nowadays the **economic value of cultural goods** is more and more considered. This field can be an outstanding tool for local development: it has a dynamic effect on the development of cities, so on countries as well. In case of Hungary the contribution of the cultural and creative sector was 4,066 million Euros meaning 1.2 added value to national GDP in 2003. (Eurostat, 2007) In this new paradigm, **marketing is as important as production**. This new economy requires creative skills and thoughts to establish a competitive advantage, so culture-based creativity is a powerful means to stand out of the intense economic competition.

Modelling creative industries is drawn upon three aspects based on geographic and cultural evaluations: global, British and European model. (Söndermann, 2007) In the following I briefly demonstrate the European model where the cooperation of three different actors is enhanced: for-profit sector, non-profit sector and government sector.

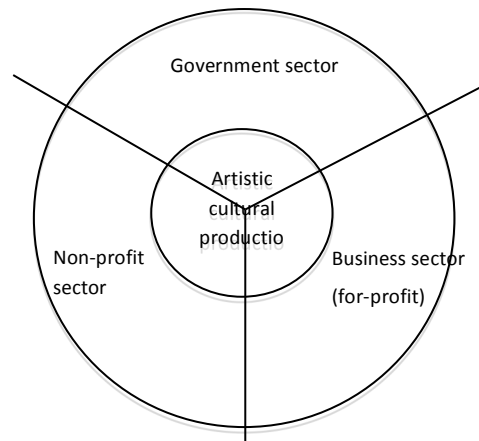


Figure 4: Central European Business Model of Creative Industries

Source: Söndermann, 2007

In the private sector creative industries follow a for-profit approach as long as during governmental interference the state is responsible for promotion and financial support of cultural products, moreover for provision of law framework and infrastructure hand in hand with tenders and aims. The non-profit sector is a sum of associations and organizations offering added cultural service, but without any financial goal. This approach will be applied by further analysis of my paper' topic where government has a crucial role in cultural marketing.

4.3. CREATIVE CLASS AS A TARGET GROUP IN COUNTRY BRANDING

By revealing the relationship of music and country branding the first question has to be answered regarding the target group of nations: who could be open-minded for a nation brand that had built its country branding strategy on music? The answer is the group of artists who are usually opinion leaders in a population composing a relevant target group and social class indirectly affecting the opinions of population as well.

Creative class is not just an attractive group of nation branding (Zenker, 2011) building an external image, but also a crucial element of internal place branding by establishment of new work places. Clustering creativity aims perpetual innovation on a long term what builds up to a competitive advantage of a nation brand like in case of Switzerland or Singapore. In this subchapter the ways in what fields the creative class is able to influence country image will be demonstrated by additional examples as well.

From a theoretical point of view, the main, possibly defined target groups in a broad sense in place marketing are: *visitors; residents and workers; and business and industry* (Kotler, 1993). However, as shown in Figure 5, groups actually directly targeted in recent marketing

practice are much more specific and diverse (Florida, 2004; Braun, 2008; Zenker, 2009). Through these specific groups the previously mentioned broader target groups can be reached indirectly. These target groups can be differentiated through their structure, but also through their particular place needs and demands. Tourists, for example, search for leisure time activities such as visiting shopping malls or cultural offerings such as music festivals; investors are more interested in business topics and business opportunities; whereas the city's customers need a suitable and sustainable environment for their purposes.

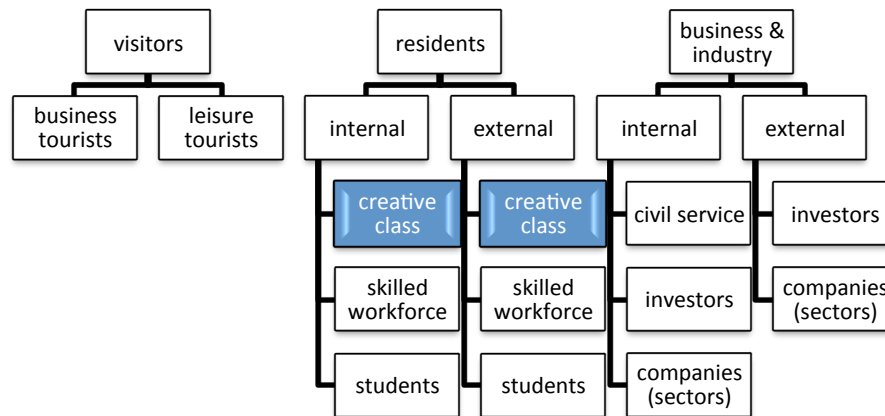


Figure 5: Different target groups for place marketing

Source: Zenker, 2011

I would enhance the importance of the **residents' group**, not just because it influences the internal and external image of a country, but this group embraces a wide variety of target subgroups. *Students* are indicators for innovation, research and development status of a country, since usually universities work together with multinational companies to enhance their competitive advantage on the market. Thus, their role in place branding strategy is essential in Zenker's opinion demonstrating them as the third target group among residents both internally and externally. Furthermore, the existence of a *skilled workforce* is an attractive factor for companies to set foot in the given country raising GDP in a cost-effective way and improving the above mentioned innovation.

In addition, the development of a **creative class** and their perpetual attraction to a country is vital as well, because creative class embodies all artistic people who are main mediators for expressing country image. The key to economic growth lies not just in the ability to attract the creative class, but to translate that underlying advantage into creative economic outcomes in the form of new ideas, new high-tech businesses and regional growth. Companies aim recruiting creative class by attractive working conditions. In the next chapters I will highlight the importance of this group and how the members of a creative class are able to influence the thoughts and associations towards a country.

4.4. PLACE BRANDING AND THE CREATIVE CLASS

Florida (2011) examined the role of creative class in a global sense where he developed the **Global Creativity Index (GCI)** for 82 nations. The GCI is a broad composite measure based on key measures of technology (R&D investment, researchers, and patents per capita), talent (educational attainment and creative class) and tolerance (from Gallup surveys of treatment of immigrants, racial and ethnic minorities, and gays and lesbians). In Figure 6 the Global Creativity Index is demonstrated on a map indicating countries with darker blue colour being more creative. Attached in Appendix 1 the ranking of countries can be seen according to the GCI. Hungary takes the 26th place, reaching different scores in areas of the index: a 32nd place in technology, 25th place in talent, 33rd in tolerance rankings. According to the study the country has a well-skilled creative human capital which is waiting to be exploited suggesting that there is a place for improvement in Hungary's country image built on the creative class.

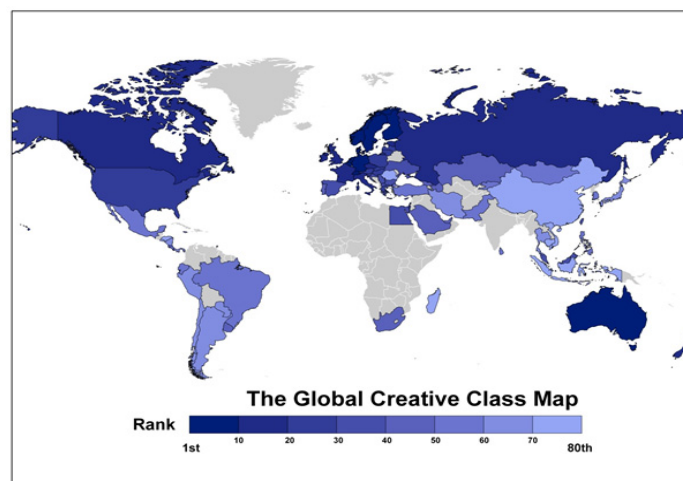


Figure 6: The Global Creative Class Map

Source: Florida (2011)

The nation brand can be developed on the basis of a personality as a reflection of local cultural industries of the city (Landry, 2000). The personality of a **creative city** is drawn from the unique character of its place and its people—from the potential, both realized and latent, found in its physical attributes, geographical position, or historical face, as well as in its intangible attributes, such as history and traditions. The success of the city, however, and the key to realize its potential ultimately lies in the brand identity of the city.

There are two approaches according to literature what the key to success is in place branding based on creative economy. In Florida's vision (2002) **creative people** have to be attracted,

meanwhile ACRE¹(2010) argues that **creative companies** should invade a country or a destination in order to achieve the synergy effects of creative economy.

The study of ACRE (2010) differentiated **hard and soft factors** for attraction of a place. Accessibility, rent levels, available land, tax regimes and subsidies are hard factors, meanwhile residential environment, public space, meeting places; (sub)cultural scene, tolerance and atmosphere are soft factors for choosing locations. Settlement and site selection of firms is affected by hard factors predominantly and soft factors currently do not play a crucial role in attracting enterprises and managers towards Budapest. However, creatives are more satisfied with soft factors of the city than with hard ones. (ACRE, 2010)

5. The Musical Aspect of Country Branding

After synthesizing the literature background the linkage between country image and music was confirmed to be relevant by pointing out the importance of the creative class. Music is able to increase the competitive advantage of a nation by fostering innovation with the help of the cluster of music experts and to translate it into cultural diplomacy policies which affect the nation branding strategy either from a domestic or an international point of view.

Indeed, music can mediate its message through several platforms connected to country branding, representing the bridge between nation branding and cultural diplomacy with music in the focus. In chapter 5.2 I will demonstrate those platforms in order to understand the influence of music on a country's life. As a result I drew a model based on Anholt-hexagon (2003) for picturing the relationship between country image and music in case of Hungary that can be implemented for practical use as well. In this chapter the external and internal musical nation image will be depicted by demonstrating different examples from Hungary (where it is applicable).

5.1. *COMPETITIVE ADVANTAGE FOR A NATION THROUGH MUSIC*

Musicians are important factors of the creative class by building a bridge between the members of population through emotional effects of music. In addition, musical representatives of a country are able to cooperate with governance and media institutes influencing the internal and external image of a country as well. However, governance has a crucial role in leading nation branding activities and attracting the creative industry too. How

¹Accommodating Creative Knowledge – Competitiveness of European Metropolitan Regions within the

are these areas connected to each other? In Figure 7 the triangle of **creative nation branding through music** is demonstrated which summarizes my findings after reviewing the relevant literature.

After adapting all related concepts I have drawn upon a connection between the three main terms of my essay. Place branding is merely connected to cultural diplomacy by different musical platforms (see Chapter 5.2.) building up as exclusive channels for country branding opportunities for all three above mentioned target groups. Meanwhile cultural diplomacy is linked to creative economy through music education and management involving the holistic view of the music business. In the third ace of the triangle, creative economy is the main driver of innovation for a nation brand by using all creative capabilities to connect new ideas. In the following I will shortly introduce these connections.

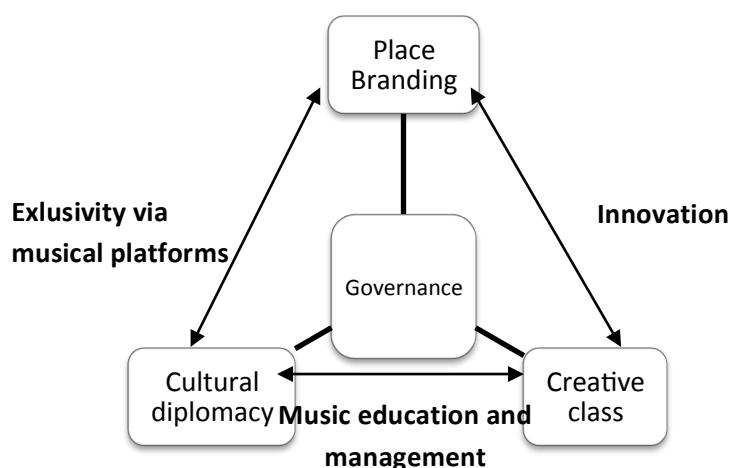


Figure 7: The Triangle for Creative Nation Branding through Music

Source: Author's edition

5.1.1. INNOVATION

Innovation is vital for a nation's competitiveness, since developing countries can improve their productivity by adopting existing ICTs. However, for firms from developed countries in order to improve their productivity, an innovation needs to be developed that requires a business environment supporting innovative activities.

The **concept of innovation** was developed in the first half of the 20th century and was first described with features still acknowledged today by Joseph Schumpeter (1911, 1942) Towards the end of the 20th century, innovation became a perpetual objective of general corporate practice and a guideline for research and economic policy in industrially highly developed countries. On the other hand, concepts gain influence stating that **social**

dimensions of technical innovations should no longer be neglected, but special qualities of social innovations also have to be taken into account (Howaldt – Schwarz, 2010).

Another interesting improvement towards the definition of innovation is the recognition that R&D activities take place no longer just in giant laboratories, but eventually in many types of organizations and places, from university labs to small start-up companies, from independent inventors and entrepreneurs to global labs. Firms have to be able to **absorb** as well as to **create new knowledge and innovation** where creative people can synthesize them into useful information to the given operation. (Florida, 2010)

Music industry is recognized as a fruit-fly industry - an early indicator of new technologies, new business models, and the economy in general. Florida (2004) reminds us that music is often the first sector to experience the technological shift - it was the first industry to face the file-sharing crisis through Napster, and now film and publishing industries are learning from its experience.

Creative thinking is needed in order to reinforce innovation in a country. A good example is Switzerland where a cluster of creative class fostering innovation in education, science and art as a new tool for country branding. Swissnex is a network of science and technology outposts run by the Swiss State Secretariat for Education and Research (SER) in cooperation with the Federal Department of Foreign Affairs (FDFA). The swissnex network is a key component of the Swiss strategic policy on the promotion of education, research and innovation that pursue the interests identified as objectives of niche nation branding, next to attract tourism and export promotion, to attract FDI and talents. (Official Web Page of Swissnex, Retrieved: March 2012)

5.1.2. MUSIC EDUCATION AND MANAGEMENT

Cultural diplomacy and creative economy are in a strong relationship through music education and management, since representatives of music business do own the professional knowledge to find gaps in cultural diplomacy for further development either in the music industry or any other related industry. In Florida's (2002) creative class musicians make up a small subset which also includes artists, scientists, engineers, educators, programmers, researchers, designers and media workers as part of a 'super creative core' that accounts for 2% of US jobs.

Music management and companies are members of relevant target groups in place branding and cultural diplomacy, so their satisfaction is of crucial importance for government's measurements. Musicians build up to opinion leaders as well that is why a lot of companies apply music as an important tool in branding such as Coca-Cola or Red Bull. (In the Primary

Research chapter I will elaborate on the topic based on the experiences of in-depth interview with Ákos Takács, Culture Manager at Red Bull.)

Meanwhile the personality of musicians, their charm and their musical talent communicates to thousands or millions of fans and people, the government may have a role for supporting the cultural development in terms of education, media involvement and building reference groups. For a developed music education system the best example is Sweden, depicted below.

Music education is exemplified in case of Sweden with various reasons for the growth of municipal music schools: the main idea was to create an opportunity to learn to play an instrument or to sing regardless of the social and economic background of the child. (Heimonen, 2004) Local authorities felt the need to organise the teaching of instrumental music. The ‘popular education movement’, (the attempt to strengthen the musical life of the municipality), and the involvement of enthusiastic individuals also influenced the growth of these schools.

5.2. MUSICAL PLATFORMS

In order to visualize the main linkages, it is essential to analyze which platforms are involved during the strategic process. Rein and Shields (2007) found some platforms in the field of sport marketing that can be adopted for music with some alterations. The platforms suggested in my interpretation are the following: *event platform, musician platform, institutional platform, digital platform, place platform*. The connection between them is depicted on Figure 9 which shows that all platforms are linked to the other. But how are these platforms manifested in practice? In the following I will demonstrate the practical view of musical platforms with examples.

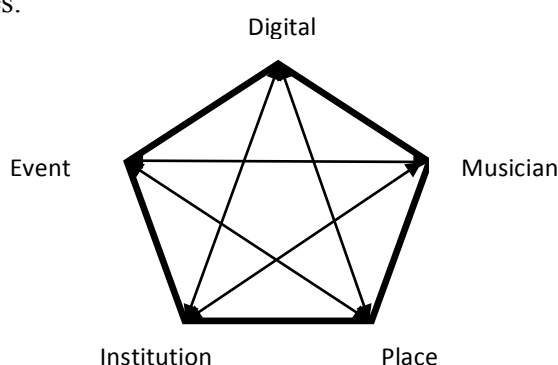


Figure 8: The Musical Platforms of Nation Branding

Source: Author's edition

5.2.1. EVENT PLATFORM

Event platform of musical identity is one of the most crucial one in terms of country branding. It has a touristic importance attracting more visitors to destinations, and

forming associations toward a destination. Three main events can be differentiated: music festivals for residents, music conferences and showcases for professionals and any other event organized by a brand within music branding strategy.

5.2.1.1. Music Festivals

A festival is profoundly meant to be an event, usually staged by a local community, which centres on and celebrates some unique aspect of that community. (Quinn, 2005) It is rooted in society being a part of people's identity and shared values. They also play an important role in exchanging ideas and experiences between art lovers and practitioners.

Festivals are tools for building a socio-cultural sense of belonging and providing a quality of life element. They are also an important part of cultural consumption in general, especially in Europe, where music festivals have their tradition expressing the so called European citizenship because of cultural heterogeneity. (Trbovic, 2011) Events supposed to have an effect on image making, attracting visitors, promoting urban lifestyle and regenerating city districts, or simply boost a country image as well. As an essential notification it must be stated that urban events have to be linked with the place and must move beyond image making preoccupation in order to avoid potential reproduction of sameness which is totally against the power of the diverse European Union.

So festivals reflect the **internal nation identity** by collecting representatives of the country and when people interact, are inspired and entertained expressing values of belonging, openness, and creativity. Besides, festivals boost **external image** when a local festival goes global as a touristic attraction spreading the positive experiences toward the host country into the world.

In case of Hungary the biggest festival, **Sziget Festival** gained popularity with its more than 350 000 visitors in 2011. The festival won the Best European Major Festival award in 2012. The festival is in cooperation with Turizmus Zrt, the Hungarian Tourism Institution for attracting more and more tourists from abroad and to build consequently the Hungarian nation image. Its main touristic numbers will be depicted in chapter 6.3.2.

Eurovision is suggested as one of the most important musical events in Europe where all countries can delegate a representative to spread their cultural values and musical talent into the world. Although the event is more or less based on political issues, since population's votes will decide the winner, the presence with a gifted musical production is essential either from internal as well as from the view of external musical country image. The Hungarian delegation in 2012 is Compact Disco, a popular band playing a song connected to equality and peace.

5.2.1.2. Musical Conferences and Showcases

Musical conferences and showcases collect music professionals to build both internal and external musical image of a country. In Hungary the range of musical conferences is quite limited, since there is no official professional conference in the industry. In 2010 there was an attempt by the Program for the National Culture of Popular Music by organizing ZipKomm where I could participate as one of the organizers. The conference mainly focused on how Hungarian music could be more competitive by adapting professional knowledge of practitioners from UK (such as manager of Muse) and tried to build a community based on mutual goals like improving the internal and external image of Hungarian music and to develop the Hungarian music scene to an international level. Unfortunately, despite the fact that the conference was free of charge accompanied by different music concerts as well, there were not so many enquirers for the professional workshop. As a result I could realize that the top-down approach (since the conference was supported by the Hungarian state) is probably not the best way to build a genuine creative community.

‘Hangfoglalás’ is an annual musical showcase in Hungary that everyone can join for free enjoying musical performances and special guests from the music scene. The event has an online magazine as well building a diversification strategy. (Available: Official Web Page of Hangfoglalás. Retrieved: March 2012)

But there are several other global music conferences and show cases where music professionals gather in order to develop their social and networking skills besides gaining new knowledge in the changing music industry. Some of them are the following:

“MIDEM takes place every year January in France and is the place where music makers, cutting-edge technologies, brands and talent come together to enrich the passionate relationship between people and music, transform audience engagement and form new business connections. They have over 6500 attendees, 3120 companies, 110 conferences, 360 journalists, and 60 gigs.” (Available: Official Web Page of Midem. Retrieved: March 2012)

“POPKOMM is the international music and entertainment business trade show that takes place every September in Berlin, Germany. Over 400 artists place in over 25 venues. They have a conference, which features over 850 exhibitors. They also feature speakers and panels from leaders in the music industry.” (Available: Official Web Page of POPKOMM. Retrieved: March 2012)

“WOMEX is the world’s biggest professional music conference, trade fair and showcase for world, roots, folk, ethnic, traditional, alternative world, local and diaspora music.” (Available: Official Web Page of Womex. Retrieved: March 2012)

Hungarian music professionals have to be aware of these events and delegate some representatives especially to WOMEX maintaining cultural heritage in folk music and MIDEM where popular music is in the focus.

5.2.1.3. Musical Events Organized by Brands

Brands use the power of music in order to engage their customers in an emotional way. Their main aim is to offer value in an exclusive way. So does Red Bull Hungary with focusing on the cultural strategy of the brand by supporting Hungarian musicians and redefining Hungarian music and identity in a modern way. (An interview with Ákos Takács, Culture Manager of Red Bull will be analyzed in Chapter 6.3.2.)

In 2011 the 200. anniversary of Ferenc Liszt's birth was hold and a special event called **Liszt Remix** was organized by Red Bull in order to salute the work of the musical figure. Four bands were chosen from different genres that recomposed a few famous work of Liszt in their own musical style. The event was a great of success where in my opinion the internal musical nation identity could be improved by the linkage of traditions and modern Hungarian music.

For the occasion of national day in Hungary celebrating the March youths in memorial of the 1848 revolution, a revolutionary poetry and reciting competition, called **Pilvaker** was organized by Red Bull where a new genre, the slam poetry was born. (Available: Official Web Page of Red Bull Hungary. Retrieved: March 2012)

5.2.2. INSTITUTIONAL PLATFORM

Institutional platform gives an organizational background for musicians in two ways: 1. according to **top-down approach** manifested in **governmental institutions**; 2. according to **bottom-up approach** manifested in **local professional alliances and new companies**.

5.2.2.1. MUSIC EXPORT INSTITUTIONS

Music Export Institutions are responsible to disseminate the musical cultural talent of a country to the world. They can provide the institutional background for gifted musicians in order to boost the country of origin's external image. Usually music export institutions provide not just a new communication platform for musicians, but a bridge between other countries' export institutions as well exploiting the social network of institutions.

Music Export Institution can be established by state or by dominant figures of the music industry – from case studies the last one seemed to be more successful by improving the involvement of all actors. Unfortunately, in Hungary the previous one was implemented (Music Export Hungary) until 2009 and it was shut down. In order to run a successful music export, high involvement is needed which can be provided by the support of record companies, musicians and business professionals.

The very good example of successful music export institutions is Sweden. Sweden is the 3rd largest music exporter in the world superceeded only by the US and the UK. The earlier successes of groups and artists like ABBA, more recently Roxette, Rednex, The Cardigans, Robyn, Eagle-Eye Cherry, Alcazar, The Hives, The Sounds, affirm the international potential of Swedish music. Those artists are supported by Export Music Sweden institution with the aim of initiating, assisting and facilitating promotion and marketing of Swedish popular music worldwide. The organization was formed by major bodies within music industry (as a bottom-up approach), i.e. IFPI² and SOM (record companies), SAMI (musicians and artists) and STIM/SvenskMusik (composers and publishers). (Available: Official Web Page of Export Music Sweden. Retrieved: March 2012)

5.2.2.2. LOCAL MUSIC ORGANIZATIONS

Local music organizations may create and support cultural intermediaries, voluntary organisations interests and lobby groups and may involve business and professional associations too. In Hungary two main voluntary organizations work nowadays: ‘Zenei Hálózatok’ and ‘Org4Org’. ‘Zenei Hálózatok’ is aimed to connect digital culture and music community; meanwhile ‘Org4Org’ has the objective to enhance cultural cooperation between Hungary and Central Eastern Europe by strengthening cultural network skills. They also support pop music programs and their advocacy groups. (Available: Official Web Pages of Zenei Hálózatok and Org4Org. Retrieved: March 2012)

5.2.2.3. MUSIC PROFESSIONAL COMPANIES

In order to foster innovation in music industry, indirectly in country image as well, high level of local entrepreneurial activity with recording studios, record production and music publishing firms (with very little state involvement or encouragement) is needed. New business models may be developed such as Spotify in Sweden. (Spotify is an online music streaming service with a subscription business model.) Spotify has improved both the general and musical nation image of Sweden, since it represents creativity, entrepreneurial skills in an innovative field.

5.2.2.4. LOCAL MEDIA

Music industry is part of media industry providing cultural artefact and human capital for different media platforms. Anderson (1991) relates how in a modern nation no one can personally know everyone else; there are just too many fellow citizens. But via music an individual can share an imagined sense of community with them. Before it was printed books that first made it possible for people to share a sense of community. Later, technological advance meant that mass-produced music could also perform this function.

²International Federation of the Phonographic Industry

There is always a **paradox between public and private media in Hungary**, since from the communism area public meant for youth something too static, not updated and sometimes boring. Although, in my opinion cultural diplomacy has to build a public media that forms the style and serves the needs of young generations as well thinking strategically about future and innovation. In Hungary the *public radio station 'MR2 Petőfi'* rebranded itself weakening the status quo of commercial radios. The radio station targets today the youth among 18-29 years with music from Hungarian pop culture by the financial support of the state. (Ocskay, 2011)

Although this shift was disadvantageous for commercial radios, the change was already needed a long time ago such as the examples of BBC, CNN and NPR illustrate. They developed a public broadcasting brand in field of television, radio and digital media with innovative technology, which is needed to happen in case of Hungary too.

5.2.3. ARTIST PLATFORM

Artists are the main figures of creative class filling in the role of **opinion leaders** in form of bands or solo musicians as icons. Associating a place with a **cultural icon** is an attempt to imbue a place with a creative character. (Evans, 2003) For a country a symbolic musical icon could build a positive brand image by its differentiator factor.

Talented musicians may be discovered through different talent shows organized by media or brands or they can be featured artists of a music export institution or any professional music business company. But after reaching a certain point at popularity every artist needs a **personal branding strategy for building a lovemark** (Roberts, 2004). Iconic brands have strong cultural roots that tap into society's values, sometimes even inspiring a shift in those values. They possess physical or symbolic features that make them instantly recognizable. They have a compelling story and manage to remain true to their original values while reinterpreting them in light of contemporary culture. (Millward Brown, 2007)

One of the best examples of iconic branding is *Lady Gaga* who imploded into music business only in 2008 becoming a superstar in scarcely a year. Her first album, *The Fame*, was the fifth best-selling debut album of 2009. (CBC News, 2010) She clearly defined her identity by starting her career in pop culture, being stamped as *outré* (unusual, different), but accordingly a creative pop diva accompanied by a professional management team and stylist group. She stands out from the sea of female pop artists' sameness by looking, acting, performing, writing, and being different.

5.2.4. PLACE PLATFORM

Place platform is dominant in the field of creativity – several countries and cities emerge with creative nation branding such as Singapore. Furthermore, countries and cities can offer

exclusivity through unique national entertainment service for destinations attracting more tourists in order to improve the quality of time spent in a given country.

5.2.4.1. CREATIVE COUNTRIES AND CITIES

Place is an essential platform from a strategic point of view where **Creative Class Index** (Florida, 2011) could show which is the most suitable environment for building a branding strategy based on music. The index shows the ratio of creative class among employees depicted the top 10 countries in Table 1. Hungary is placed at 24th among 81 countries which fact indicates that Hungary should focus on engaging domestic representatives of the creative class in the nation branding strategy, especially focusing on Budapest as the centre of creativity and talent (See Chapter 5.3.).

	PLACE	CREATIVE CLASS
1	SINGAPORE	47.3 %
2	NETHERLANDS	46.3 %
3	SWITZERLAND	44.8 %
4	AUSTRALIA	44.5 %
5	SWEDEN	43.9 %
6	BELGIUM	43.8 %
7	DENMARK	43.7 %
8	FINLAND	43.4 %
9	NORWAY	42.1 %
10	GERMANY	41.7 %

Table 1. Creative Class Index

Source: Florida (2011)

5.2.4.2. EXCLUSIVE NATIONAL PLACES

Exclusivity is one of the most important elements of music branding (Heartbeats, 2010) and for emotional branding as well (Gobé, 2001). Exclusive places and content are able to decrease the risks of cognitive dissonance by linking customers in an emotional way.

In case of Hungary there are several exclusive places which cannot be found in other parts of Europe mediating the modern Hungarian cultural scene. These places are in strong relationship with music, since usually typical modern Hungarian places are **exclusive bars** or **'ruin bars'** fuelled with the atmosphere of Hungarian nightlife. For example, the 'A38' club (standing ship on the Danube) won the competition for the World's Best Club title in 2012. Bronze medallist became the also Hungarian 'Szimpla Kert' with its ruin pub image. Furthermore, **Hungarian spas** inspired László Laki to establish an exclusive event for tourists, called Cinetrip, a party night with famous DJs in Hungarian spas. The success of this event was undeniable by attracting young tourists to attend one of these special events. Today Cinetrip is replaced by Night of Spas.

5.2.5. DIGITAL PLATFORM

Due to the rise of digital technology globalization just grew and grew bigger. Firstly, we could face the globalization of countries, secondly, firms and companies were globalized and

nowadays individuals can communicate in a global way as well. (Demos, 2006) According to Friedman (2006) digital platform works with no attention on geographic distance, time differences or in near future without language barriers..

Yet, there is no unambiguously successful business model for building a profitable company related to musical activity. Although, there are several innovations such as applications, streaming service and music-related content available online which could be integrated to a nation brand strategy as well. But how does music use the digital power of internet and how could nation branding apply it too?

Social media is meant to be to share musical content either made by professionals or by other members of the community in the manifestation of UGC (user generated content). Applying this phenomenon country branding can be revealed on social media sites with the help of music such as MySpace, Facebook or YouTube. Furthermore, Deezer, the French music streaming company just introduced its service in Hungary. Deezer labelled Hungarian music separately on its site demonstrating that local content is crucial for the company's strategy. Music is a global common language that can be used for spreading national music; meanwhile social media platforms are able to build domestic music image as well.

Due to the digital platform music is globalized in every sense and is manifested in different global events such as festivals (Glastonbury, Sziget etc.). Innovative **location-based communication technologies** (augmented reality, Foursquare, Facebook Places etc.) can be applied during a festival or city branding activity in order to improve the experiences of visitors. These experiences can be manifested in *social video creation* and *tagging service* when in a crowded festival with many stages everyone can find their friends by GPS coordinates and smart phones.

Furthermore, through personal branding musicians are able to connect to their fans intimately in real and in the digital world, so the **online cluster of musicians** is able to develop an institutional platform. The institution can be a governmental organization focusing on social development or an informal community based on musical engagement or an education system where music and other cultural artefacts are considered as basic literacy.

Online media is more and more important **in the field of cultural diplomacy**, especially in an international environment. In Western and Northern European Countries cultural diplomacy has its own web page with local and international content as well depicting the country's cultural diplomacy strategy in a global and transparent context, where collaboration

between institutes plays a crucial role. In Hungary this approach is in transition now, since the Hungarian cultural institute called Balassi Bálint Institute has recently developed its official web page with modern design. Although for further improvement English content and social media platforms embedded into the web page should be considered.

5.3. THE MUSICAL ASPECT OF NATION IMAGE

For defining the country image based on Anholt (2003), a transparent and united national music identity has to be defined with encompassing all cultural elements, since without a strong internal nation identity no external nation image can be genuinely facilitated. In the following I will scrutinize the internal and external musical aspect of nation image in case of Hungary.

5.3.1. INTERNAL MUSICAL NATION IMAGE

National identity has been thought of as creation in the minds of those who share a certain bounded community created and reinforced by mass media. Music is just one possible element and platform of mass media, but certainly one of the most important one with the ability of affecting emotions, memory and social bond. “National identity is the extent to which a given culture recognizes and identifies with its unique characteristics.” (Herskovits, 1948)

National music identity is the key element of building a musical image of a country both internal and external. First of all, the factors of national music identity has to be defined which are depicted on the following figure based on Herskovits’ (1948) model of National Identity. In my interpretation language and lyrics are applicable for cultural homogeneity providing that a small country like Hungary has its own language identifying a homogenous group of people who understand the contextual lyrics. Only tradition as national heritage remains in the model showing that cultural roots are important factors for musical identity as well. Other additional dimensions come into the model: genre as the musical product being characteristic for a country and the previously depicted musical platforms on a local base can transfer the national music identity. Instead of ethnocentrism exclusivity and authenticity appears which reflects the positive and patriot associations toward the country of origin.

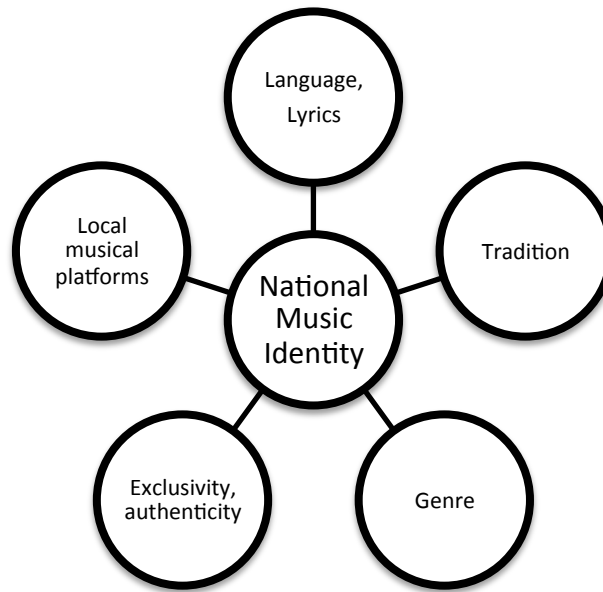


Figure 9: Factors of National Music Identity

Source: Author's edition (based on National Identity model of Herskovits, 1948)

There are several local and unique contents building characteristic elements of national music identity: **traditional values, language uniqueness, the nature of lyrics** and **authentic genres** are connected to special countries. According to Weyer (2012) world music as part of the popular music is able to deliver the nation's values and traditions.

National music identity has to be mediated **through local musical platforms** where the residents of a country can truly understand the value of a musical artefact. In addition, it is of a high certainty that they will meet those musical goods in person either through local media, digital platform, in a local event or in the activity of a local music organization.

But tradition is learnt through our infancy rooted back to our past which may be forgotten by today's youth and the overall population. That is why I consider the importance of **public music education** on a high level that can be facilitated by local cultural policy measurements. Regarding Sweden, popular music education, especially among young people is encouraged. It is a public policy designed over the past 25 years with the intention to create a tradition of music making and appreciation among Swedes. Programmes and grants are available today for music education as well as the production and dissemination of recordings what are all funded by government. As a result of this policy, a number of professional musical careers were pursued.

Just let us think about the cultural goods where traditional nation music elements were translated into a genuine and modern tabard by popular artists like Björk from Iceland or Tarkan from Turkey. They both achieved an international career dispersing their cultural roots into the world in the phenomenon of “glocalization”.

5.3.2. EXTERNAL MUSICAL NATION IMAGE

External Musical Nation Image is manifested in practice in all six fields of Anholt-hexagon demonstrating the power of music in country branding. In the following I will depict the six dimensions briefly in case of Hungary.

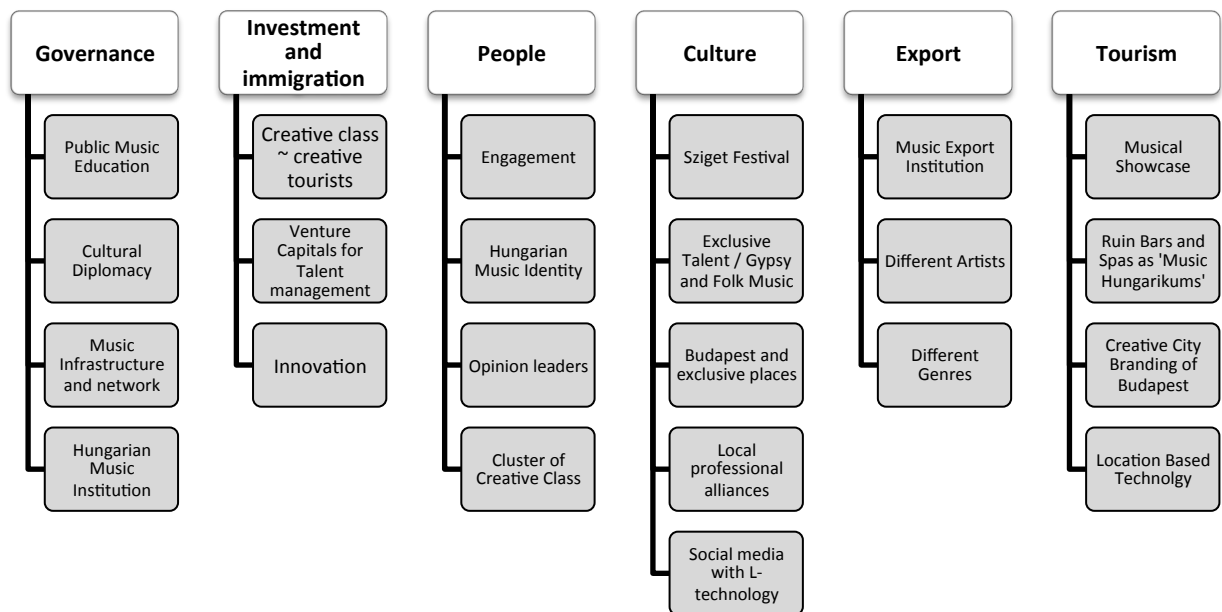


Figure 10: The Musical Aspect of Nation Image in case of Hungary

Source: Author's Edition

5.3.2.1. 'GOVERNANCE'

Music has a *political dimension* by demonstrating different values and thoughts about political directions and events in a popular way. (Pedelty - Keefe, 2010) The connection between music and politics, especially political expression in music, has been seen for instance during the campaign of Obama in 2008, but in many cultures through many examples. Music can be used in anti-establishment themes, like anti-war songs, although supporting and recruiting ideas are also used, for example in national anthems, patriotic songs, and political campaigns.

Political music is used to transfer a specific political message. Even in case of pop acts like Rage Against the Machine, Clash or U2, the political message in their music is considerable, and it usually reflects the political context of the time the given song was written.

The first dimension is Governance that is already involved in the triangle demonstrated in Chapter 5.1 how nation branding, cultural diplomacy and creative economy are connected to each other. All three elements should be manifested in an institutional education system, which gives freedom to the cluster of creative class. Furthermore, public music education is of crucial importance in order to improve the Hungarian Musical Nation Identity on a long-term. *Cultural diplomacy* could embrace the support of creative industries by **improving infrastructure and technology appliances** for artists, as long as **international network systems** may be enhanced as well. Usually ministries, portfolios and export institutions are pillars of the institutional background for music culture and their numbers and efficacy are reliable indicators for professional networks.

In case of Hungary we can witness an interesting situation considering governance and political factors, especially in recent economic situation. In case of Hungary the *infrastructure* of informal and formal associations and institutions is underdeveloped depicted in chapter 5.2.2., so network opportunities and musical identity building are obstructed in that way. On the governmental perspective we can see a fragmentation of different institutions, which are not working in harmony. Although, there is no **Hungarian Musical Institution**, which should be implemented in the near future in my opinion in order to represent the interests of Hungarian musicians and to provide a transparent financial support model for this area. According to Söndermann (2007), the state as a key player has to be involved in supporting national music, where a distinguished institution system is expected.

5.3.2.2. 'INVESTMENT AND IMMIGRATION'

Investment and immigration is manifested in the concept of *creative class*, since creative people are densified in one place, they are willing to relocate if the environment offers them a liveable place considering career opportunities, art and entertainment events. From the *Immigration* perspective, Hungary with its excellent human capital should focus on inviting those creative minds into the country by promoting creative activities such as music or film. Budapest is a favourable place of movie making - nowadays, the next serie of movie 'Die Hard' is filmed with Bruce Willis or Angelina Jolie shot "In the Land of Blood and Honey" in Budapest. The colourful and unique characteristics besides reasonable price of the city should be highlighted for future cultural products as well.

There is a trend in music industry that venture capitals fund talents or network of talents (bands, designers and so on) in a patronizing business model. Although in Hungary the venture capital spirit is in transition right now, focusing mainly on technological innovation, social and cultural innovation will be the next steps where talented musicians can find their investors. **Talent management** has been already applied by commercial televisions transmitting talent shows in every year with a great success. In addition, *social and economic innovation* enhanced, since the cluster of creative class offers a variety of **professional knowledge** opening the door for new communities, ideas and connections besides technological development.

In Hungary there are several talent shows yearly such as “X-faktor”, “Csillag születik”, “Megasztár”, although the venture capital attitude is still missing. There are movements in form of Start-Up Underground organization or Kairos Society Hungary or other communities aiming to boost the entrepreneur spirit in Hungary, but in my opinion the population still suffers from communism times valuing risk-avoiding behaviour. In my prognostication the near future will bring some changes in this field where start-ups with musical or creative focus and new local business models will play a crucial role. There is an invention already in the entrepreneur area called Noispot (Official Web Page of Noispot. Retrieved: March 2012) – the social pubbing box where either fans can vote for their favourite music in a catering place or Noispot DJs pick the finest music, so customers would have an even better time and would come back more often.

5.3.2.3. ‘PEOPLE’

In the People’s dimension the **soft power of music** can be detected: music has proven *effect on our biological system* by generating emotions which affects our consumer behaviour as well for instance in a supermarket. (Ratey, 2001) Music is able to *influence our decision-making process* by fostering new ideas or just simply speeding up the process itself. (Gorn, 1982; Smith and Curnow, 1966; Park and Young, 1986) Indeed, music builds a *bridge between nations* offering a mutual language. In addition, music is a considerate element of a nation’s image and culture which is *unique and mostly not copyable*.

Residents of a smaller country share the same values and traditional roots where **national music identity forms** cooperation and tolerance as well. In case of Hungary, folk music, classical music represents traditional values and most surprisingly some of the traditional motives (for instance Kalocsa) were already used by fashion designers or famous singers. Consequently, Hungarian people should be educated about popular Hungarian music history, so youth can be engaged in a genuine way of supporting **Hungarian Musical Identity**.

Creative class is manifested as one of the main target groups in nation and place branding. Musicians are **opinion leaders** in population who have a brand value as well by improving

the image of a destination by positive feedbacks in interviews or articles, so their cluster should be welcomed either on a national or an international level (especially considering Eastern-European countries)..

5.3.2.4. 'CULTURE'

In the Culture dimension the previously mentioned *musical platforms* (see Chapter 5.2.) are summed up which are connected to each other directly building a **synergy effect** in the brand building process. In case of Hungary the most developed platform is the Event platform with **Sziget Festival**, winning the Best European Major Festival title at the European Festival Awards. The votes came from a fan base of 60 countries, which also indicates the multiculturalism of Sziget festival and its power in the field of country branding as well. Sziget had in 2011 around 400 000 visitors and 80 % were foreigners among the owners of the season tickets according to Károly Gerendai, the organizer of the festival. (Music Magazin, 2011) However, it is not supported by the state despite the suggestion in Söndermann's model (2007), despite the fact that Sziget is able to boost the Hungarian musical image.

In the *Place platform* Budapest has its dominant role by its creative characteristics, good location, relatively low wages and extremely high potential of human capital in the region. The attraction of the city can be improved by location-based services indicating innovation and technological development of the country as part of the *Digital platform*. For the *Institution platform* the bottom-up approach of musical alliances should be fostered hand in hand with the restructure of public media based on the success of BBC, CNN and NPR.

5.3.2.5. 'EXPORT'

What is still an empty space in the Hungarian music scene an **icon** associated to the Hungarian modern culture and its personal charm understood globally. According to my previous primary research in 2009, classical composers such as Liszt, Kodály and Bartók are musical icons in foreigners' opinions. Besides classical music, only one genre is popular worldwide as Hungarian music, called **gypsy music** encompassing several representatives such as Romano Drom. Meanwhile we can see that for instance in case of the United Kingdom the modern indie music is connected to the country image itself.

Furthermore, both the institutional and digital platform of music stand on weak legs, because there is **no governmental organization with execution power directly connected to music industry**. There was an organization called Program for the National Culture of Popular

Music, but along with the political change their support was eliminated and their work should be closed down. An original digital platform embracing all Hungarian musicians and their discography is still missing; moreover, a Hungarian business model for building a financially fruitful industry is still uncovered. That is why Hungarian ground is a perfect place to set foot as a multinational company who offers different music streaming or downloading services, since there is no powerful competitor on the market yet. We can witness that this phenomenon was realized by Deezer, the French music streaming service, who introduced its streaming service just in January of 2012.

When it comes to the export and brand dimension, it is interesting to note that there is no such an image in the average person's mind that Hungarian cultural export according to my primary research in 2009. Indeed, it is a genuine weakness of the gifted and colourful Hungarian culture.

5.3.2.6. 'TOURISM'

Tourism is consequently connected to the cultural dimension considering place and event platform, especially in states where country branding is developed by a state-owned or state-supported institution like in Hungary. Hungarian inbound tourism can build an exclusive content and association working with the music industry. For instance, there was the so-called *Cinetrip* offering spa service accompanied by exclusive DJ-service and party management. Although its price was quite expensive, there were more and more tourists who come to Budapest just because of this exclusive leisure time activity being totally unique in the European area. Today the event called '*Night of Spas*' fills the vacancy of Cinetrip.

Another tourism boosting event is **Sziget Festival** winning the Best Major European Festival prize in 2012. The Sziget Office emphasizes the importance of international relationships and marketing that is why I conducted an interview with the International Relationship Manager of Sziget Office, with András Berta. (see chapter 6.3.2.)

In the *Tourism field* Musical Hungaricums are needed to define which can be based on genres, places or exclusive services. As I mentioned before, Sziget Festival has its touristic power as the only musical showcase of Hungary, although professional music conferences should be developed. Through creative city branding of Budapest the image of a colourful and vivid city could be enhanced by country branding strategy built on creativity, music and ruin bars being popular worldwide. Talents and inventors were already the message of previous country branding strategies, but in my opinion for a long-term the touristic goals should be engaged to the direction in creative city and country branding.

6. Primary research

As it was mentioned before due to the nature of this topic a primary research was required to uncover the main linkages between different platforms and to prove that music influences associations towards a country appearing as an essential branding instrument in a country branding strategy.

6.1. THE METHODOLOGY OF RESEARCH

In the research methodology I arrived to the primary research part after a deep analysis of secondary data, so in the following I will concentrate on the qualitative and quantitative phase of my research.

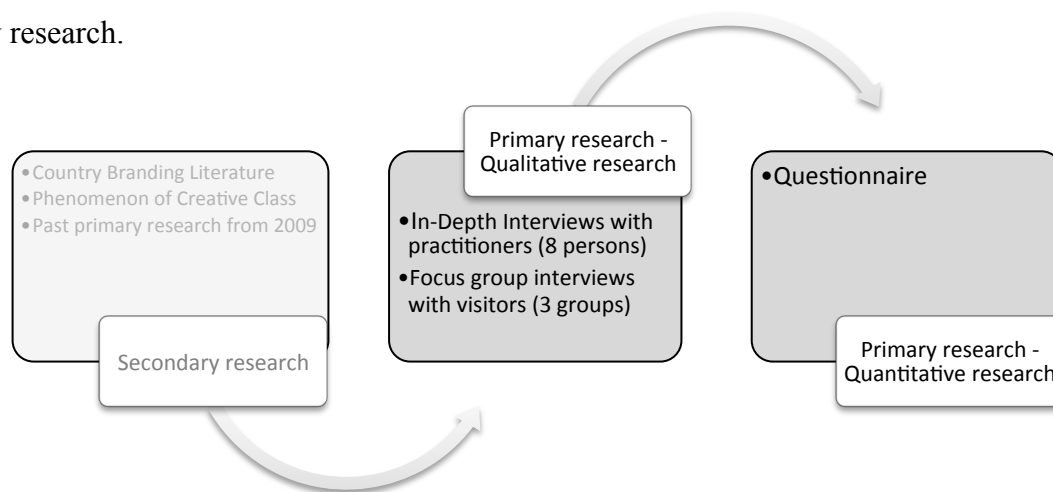


Figure 11: Research Methodology

Source: Author's edition

6.1.1. THE METHODOLOGY OF PAST RESEARCH IN 2009 AND ITS MAIN RESULTS

In 2009 I already conducted a quantitative research with an online sampling questionnaire; since my research experience showed that among youth the willingness to fill in an online survey is much higher. Furthermore, the diffusion of the questionnaire made me possible to reach professionals or foreign students.

Because of the scarce research on this topic available the questionnaire design contained complex, several type of questions. For revealing attitudes and experiences, I used open questions. In addition, I applied multiple questions as well combining Likert-scale where I focused on the connection between music and country image, especially in case of Hungary. The data was analysed by SPSS software. The population is not representative because of limited resources, but data is fits the requirements of an exploratory research.

In the end I collected 187 Hungarian and 33 foreign respondents with a range of 15-52 years where the average age was 24.37 years. Foreign responses came from US, Germany, Spain, Sweden, Mexico, Brazil, Netherlands, France, Finland, Ukraine, Serbia, and Czech Republic. The ratio of female-male was 47% to 53% and according to their occupation 66 % of respondents were students.

In case of Hungary there was no correlation between musical association and the general country image. However, a constant negative attitude could be noticed in the answers, there are several positive responses for a bright future like *“there are many talented Hungarian musicians”* or *“there is a great opportunity in the Hungarian music”*. In other countries, the correlation between music and nation image was undisputable. United Kingdom seems to be the “Music Power” of Europe, since it has the highest number of music exports in Europe and the most fruitful music market as well. There was a strong relationship between country image and music in general associations as well, where a lot of bands and associations with indie music were mentioned.

Among cultural goods music products were the most suitable for export activities in the Hungarian culture according to the respondents – besides music potential, classical music, architecture and Hungarian gastronomy were the most popular among foreign objects. The question related to Hungarian music export resulted in ambiguous answers – the majority does see negatively the activity of music export because of scarce financial resources and the absence of music management professionals. Foreign people did not know the Hungarian music, so they associated it with a poor quality.

The main conclusions of the questionnaire in 2009 were:

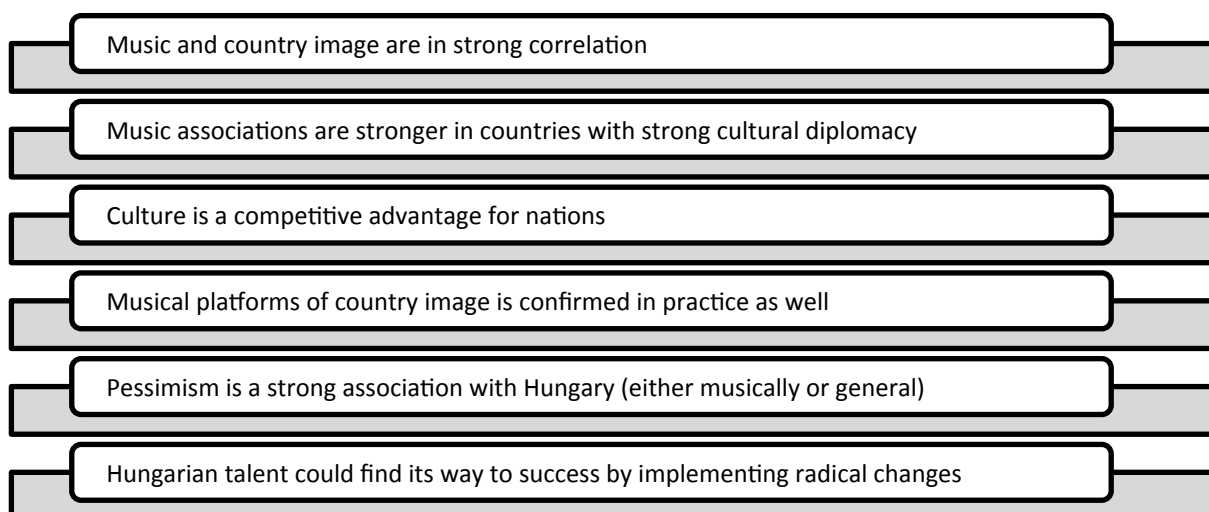


Figure 12: Results of Past Research in 2009

Source: Author's edition

6.1.2. THE METHODOLOGY OF PRESENT RESEARCH IN 2012

Qualitative research allowed me to examine issues in depth in order to uncover genuine insights related to the topic. One of the most important advantages of qualitative research that interviews are not restricted to specific questions and can be guided by the researcher in real time which helps to make slight alterations in the research framework and direction as new information emerges. (Malhotra, 2005) However, data usually are collected from a few cases or individuals so findings cannot be generalized to a larger population. For quantitative research phase I designed an online questionnaire. Data are not representative, but for the given population some generalizations can be drawn according to the nature of the topic. In this research a cross-sectional research design (McGivern, 2003) is chosen which could be repeatedly conducted in the near future to track down the changes in the research topic.

6.2. POPULATION

The population of this study consists of **university students and entrants** which decision has more reasons. Most importantly, considering my resources they can be reached very easily through my social network (both domestically and internationally). It is important to note when adequate resources are available a representative sample could be drawn. (Note: for depth interviews the population consists of practitioners who are related to music industry) Regarding the research methods the following populations are targeted in the study:

1. *In-depth interviews with practitioners* – 8 experts were asked with the help of a guideline in order to identify key linkages between music and country branding. The sample consists of practitioners from music business sector, involved in the technology and innovation field as well artists.
2. *Focus group interviews with university students* – two groups of 6-8 Hungarian persons and one international group with 6 persons with the help of a guideline in order to identify basic attitudes, perceptions towards music and its relation to countries. The international group was an online focus group regarding geographical distances. Three of them have visited Hungary already; the others have not been to Hungary before. Furthermore, music branding options are discussed too in order to find a possible way to improve country image with the help of music. Through these interviews it was possible to gain colourful insights for consumer behaviour and psychology and it was able to differentiate between the internal and external musical image of nations.

3. *Online questionnaire designed for university students* –152 people were asked in order to get quantifiable data to make generalizations in the topic for the given population. Besides general attitudes towards music the main associations are analyzed between countries and music with a special focus on Hungarian music and festival culture.

During the sampling phase convenience sampling was applied in all stages of the research design. **Convenience sampling** (sometimes known as grab or opportunity sampling) is a type of non-probability sampling that involves the sample being drawn from that part of the population, which is close to hand. (Malhotra, 2005) In addition, snowball sampling is a similar technique, where existing study subjects are used to recruit more respondents into the sample. These methods were used via *online survey* and *virus mechanism*. However, online sampling is limited, because some questions may be not clear or respondents just simply do not answer some questions. For avoiding these constraints I pre-tested the survey and made settings to force people for answering all questions.

6.3. RESULTS OF QUALITATIVE RESEARCH

First of all, I will depict the results of focus group interviews where two Hungarian groups and one international group were observed. In the second part, the main conclusions of in-depth interviews with practitioners from music industry are demonstrated.

6.3.1. FOCUS GROUP INTERVIEWS

For sampling method, I used a filter survey for indication of country of origin. Two groups were differentiated according to their nationality: **two** of them were **Hungarian groups** of students and one of them was the **international group** with university students from Switzerland, Germany, Netherlands, Russia, France and Serbia. During the focus group interviews I concentrated on the following question blocks:

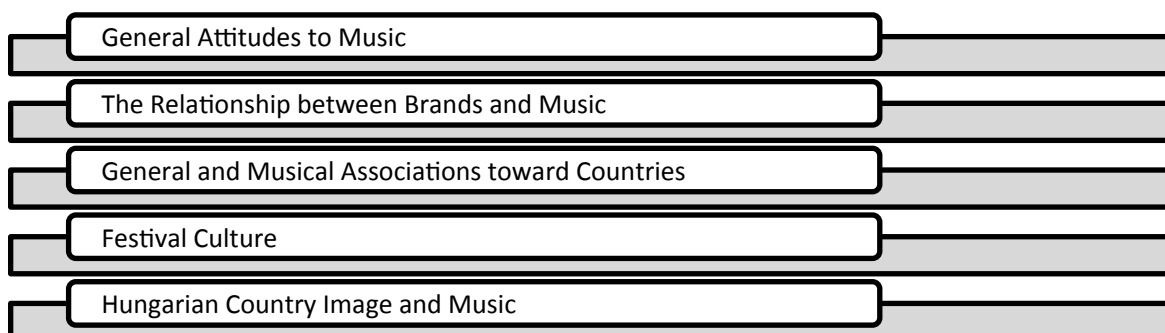


Figure 13: Question Blocks of Focus Group Interviews

Source: Author's edition

6.3.1.1. GENERAL ATTITUDE TO MUSIC

During the short introduction and small talk about music consumption behaviour (see the Focus Group Guideline in Appendix 2), I identified two types of people according to their attitude to music: one person determined music as „*the most important thing in my life, I could not imagine a day without music*” and the opposite person just noted that “*music does not play a special role in my life. Usually I listen to music in my father’s car in the weekend.*” I labelled the different groups according to their involvement in music as ‘**dedicated**’ (listening to music more than an hour per a day) and ‘**neutral**’ (listening to music an hour or less per a day). During the focus group interviews there was a perpetual distinction in answers and behaviour among those group members.

6.3.1.2. BRANDS AND MUSIC

I played different audio music parts asking whether the subjects can associate with a brand. The technique was the following: after playing 15 sec from the given song I asked about the associations and when there was no correct answer I gave some answer possibilities until they found out the right brand. The following music songs were played matching the given brands:

Company	Musician	Song	Rank (Hungarian)	Rank (International)
Túró Rudi (for Hungarians only)	Quimby	Láss ezer csodát!	1	-
Coca-Cola	Natasha Bedingfield	Shake Up Christmas	2	1
Sony Bravia	José Gonzales	Heartbeats	3	8
Chrysler	Jay-Z	Heart of the City	4	2
Microsoft	Madonna	Ray of Light	5	7
Absolut	Cee Lo Green	Distilled	6	4
Coca-Cola	David Guetta		7	3
Blackberry	U2	Blackberry Loves U2	8	9
Google Chrome	OK	Pilobolus	9	5
Nokia	deadmau5		10	6
Kodak	Lady Gaga	Poker Face	11	10

Table 2: Ranking of Brand and Music Relationships according to Time Spent on Task

Source: Author’s edition

‘Neutral’ persons could not match any of the brands to bands mentioned, they usually said: “*I do not know, please take the next question*”, meanwhile ‘dedicated’ persons wanted to find out the results. According to the time subjects spent on finding the right answer the ranking is depicted in the Table 2. The results were the same among international and local groups. In general, it can be noted that *respondents could not connect brands with music spontaneously*. Coca-Cola was associated with bands the most successfully which might be a result of a strong emotional branding strategy related to music. Among Hungarian groups the local brand Túró Rudi was the most well known sonically where patriot feelings and consumer ethnocentrism could play a crucial role. (Herskovits, 1948) Some of the respondents said that one of their favourite bands is Quimby played in the commercial of Túró Rudi that is why they could recall the commercial easier. Consequently, emotional attachment to a musician resulted in a better recall of a brand as well.

6.3.1.3. GENERAL AND MUSICAL ASSOCIATIONS TOWARD COUNTRIES

In order to evaluate the musical associations toward countries, I examined which are the spontaneous associations towards a country. The results varied in a wide range, but mostly answers came from the fields of geography, gastronomy, people, economic situation or personal experiences. There were some opinions regarding music as well, but only in case of UK, US and Sweden. In the following figure I depicted the ranking of countries according to time they spent on finding out which country’s music was played for 15 sec (the list is showed in Appendix 2). After ranking I paired the three most mentioned associations toward a given country: general ones in the first and the musical associations in the second row.

	Manchester United, fish and chips, Indie Beatles, Indie, European Capital of Music
	Hollywood, Pop Stars, New York Music Factory, Independent Labels, Lady Gaga
	Swedish electronic music, Swedish girls, cold weather Music education, ABBA, music export
	Cold weather, Pessimism, Dark mood Metal, Nightwish
	developing country, dangerous, cigar latin rhythms, Shakira, dance
	Italian guys, Rome, economic crisis Pavarotti, opera, romantic music
	cold weather, hockey, Toronto Celine Dion, Bryan Adams,
	tapas, late parties, Spanish language, Barcelona salsa, Enrique Iglesias
	vodka, communism, developing country Tatu, Russian folk music, drunk people
	French language, French people do not want to speak English, Eiffel-tower chanson, Edit Piaf, harmony
	Surfers, Sydney, Olympics ACDC, traditional music of inhabitants
	"On time", strict rules, "Würstel" German rock, German VIVA, Rammstein

Figure 14: Spontaneous Associations toward Countries Generally and Musically

Source: Author's edition

6.3.1.4. FESTIVAL CULTURE

Festival culture was relevant for students with '**dedicated**' attitude, but predominantly **smaller boutique festivals** are getting more and more attractive for subjects. Although, big festivals have a lot of visitors, some of them do not want to participate in such a huge event - those students were involved in **underground music** intensively. They said that festivals are getting too crowded, not that friendly anymore, although the chance to meet some persons from different cultures is bigger. Some Hungarians enhanced the importance of **Sziget Festival** where Hungarian culture can show itself to different nations, meanwhile there was one foreign student who did not know about this festival before.

6.3.1.5. HUNGARIAN COUNTRY IMAGE AND MUSIC

Hungarian country image was different among local and international students where **personal experiences** played a crucial role. As an internal identity and image respondents said that Hungarian people are **too pessimist about their talent and opportunities**, although international respondents could not mention more than three Hungarian inventions. Respondents said that they knew some friendly persons from the country (mostly exchange or university students), and when they visited Hungary, they were enchanted by the **difference of Budapest** – they mentioned not just gastronomy, but the *phenomenon of ruin pubs* besides active and *colourful nightlife* as the power of Hungary.

For the ‘World of Potentials’ country image video different opinions came out as a result. Hungarians mentioned that the content of the video was emphasizing too directly the inventors of Hungary, which distorts the message of the video. The music caused different opinions: for Hungarians it was mostly intriguing and not modern, meanwhile for foreigners it was a surprising genre depicting the Hungarian musical elements.

For Hungarian music icons Hungarian respondents mentioned Quimby, Ákos and some representatives of world music as well. Although in their estimation there is still a place for improvement regarding musical icon for Hungary. Hungarian music caused some difficulties for international students, since they did not know Hungarian pop music or genres, so they associated it with poor international presence of Hungarian music culture. Only Liszt’s name was mentioned and gypsy music as a genre was associated with Hungary by the persons with ‘dedicated’ attitude. Among Hungarians the **absence of professional management** was mentioned, although they could not imagine in the near future that one of the Hungarian musicians could be famous worldwide.

6.3.2. IN-DEPTH INTERVIEWS

For exploring more insights from the practical side as well, I conducted interviews with practitioners from different areas of the music industry. According to the profession of interviewees I personalized different question blocks focusing on music trends, Hungarian country image, cultural diplomacy and creative class, moreover musical Hungaricums, talent management, festival culture and Hungarian music and export. In the following figure there is a summary about the interviewees (Appendix 3 contains a short introduction of these persons):

NAME	CATEGORY	PROFESSION	COMPANY	GUIDELINE
Bátorfy, Attila	MEDIA	Journalist	Kreatív	Appendix 4.
Berta, András	MANAGEMENT	International Relationship Manager	Sziget Festival	Appendix 6.
Delov, János	MUSICIAN	Musician	Random Trip, Turbo	Appendix 7.
Fehér, Balázs	MUSICIAN	Musician	The Carbonfools	Appendix 7.
Lepés, Gábor	MANAGEMENT	Musician and Management	Balkan Fanatik, Ákos	Appendix 7.
Takács, Ákos	MANAGEMENT	Culture Manager	Red Bull	Appendix 5.
Újfalusi, Gábor	STATE		Hungarian Institute for Culture and Art	Appendix 8.
Weyer, Balázs	MEDIA	Journalist, Researcher	Origo, University of Sheffield World Music Studies	Appendix 4.

Figure 15: The List of Interviewees

Source: Author's edition

6.3.2.5. MUSIC TRENDS

Ongoing **music trends** were uncovered by Attila Bátorfy stating that besides digital music trends like dropping sales and new business models, the fragmentation of music genres and their fast fashion was highlighted as well. In his opinion “*there are no such genres like Hungarian music*”, although world music and folk music was mentioned as a good basis for improving Hungarian music, which will shortly fragmentise to smaller pieces.

6.3.2.6. HUNGARIAN COUNTRY IMAGE

About the country image of Hungary, all interviewees painted a **pessimist picture about Hungary** regarding political issues and poverty. Although, they agreed on rich cultural heritage and excellent human capital of the country, the *technological arrears* were undoubtful.

Gábor Újfalusi delineated a **touristic approach**, where he differentiated based on age: for older generation Hungary is the sum of traditional, but *static* pictures like traditional goulash, steppe and Donau image, meanwhile for younger generation Hungary means a *dynamic* always changing country where they want to integrate into the culture even for a short period by knowing Hungarians, how they live, what their goals and thoughts are. “*The last group is the group of “creative tourists” who want to experience the living Hungary in a rational*

way“. Unfortunately in today’s’ touristic goals this group is not targeted separately in his opinion, although guides printed abroad have already discovered the importance of the individualistic, independent group of creative tourists by offering alternative programs for visitors.

Újfalusi enhanced the **absence of strategic approach in country branding**, since in every two years, the topic of Hungarian tourism is changed. In his esteem only a strategic long-term thinking should be able to change the stereotypes towards Hungary which requires an engagement in one direction on a long-term.

6.3.2.7. HUNGARIAN CULTURAL DIPLOMACY

Hungarian cultural diplomacy was a crucial issue among interviewees. In fact, according to Balázs Weyer it is a **missing attempt** from governments’ perspective, which covers a lot of future branding opportunities. In his esteem *“through promoting Hungarian literature, folk dance and folk music Hungary could improve its image”*. For instance, last year at WOMEX the Hungarian delegation achieved a great success, although the government did not support the representation of Hungary on a desired level. Balázs mentioned, that *“right now there is a perpetual negotiation about Hungarian organization of WOMEX in 5 years, since last year during the “Hungarian topic” WOMEX resulted in one of its greatest successes”*. He enhanced the network of Balassi Institutes which is not exploited on a high level yet.

Gábor Újfalusi agreed with his opinion that **there is no central strategy for cultural diplomacy**, although in other fields of culture, we can witness some improvements. In case of Museum of Fine Art the establishment is in the chain of the ten most well-known museums in Europe which has its benefits by building network and importing or exporting exhibitions. There was another attempt in London last year, where for three months Hungary was the central topic in the city’s cultural life. For Hungarian people it unfortunately does not support the national identity from a cultural point of view, since these efforts are usually not well-communicated - there is a place for improvement in cultural marketing practice. In his esteem, cultural marketing should be built into the higher education system. *“There is only 8 courses connected to music management education in Hungary by now and unfortunately regarding their quality there is much room for improvement.”*

6.3.2.8. HUNGARIAN MUSIC EDUCATION

Interviewees found that there is no quality public musical education. Attila Bátorfy mentioned: *“Although I sang in a choir in primary and secondary school as well, I can totally understand if someone does not want to hear about music again in their lives. It was such an embarrassing course for people who could not sing at all.”* **The focus of music education should be shifted** to focus on music history that would not stop at the work of Kodály and Bartók, but continues to the modern music culture as well.

According to Gábor Újfalusi, there is an opportunity for teachers to design a curriculum supplemented with rock history or popular music, but teachers still do not want to get involved in it. The cause for this phenomenon is still uncovered, although a final goal should be to equip all secondary schools with separate music class rooms and to provide them with the opportunity of playing a musical instrument too.

Hungarian music education on a university level is extremely good quality in knowledge: musicians can learn from the best teachers in Jávorsky's opinion, although the level of physical environment and technological background is sometimes embarrassingly low. He said: *“For an entire semester I had my jazz classes in a changing room of dancers, because the Music Academy had not own a separate building for jazz course.”*

6.3.2.9. CREATIVE CLUSTER

Creative class was no new concept for interviewees however they stated that in practice the cluster of creative class does not exist in Hungary. According to Attila Bátorfy *“Hungarian nation is traditionally a literature culture – the education system merely supports this brunch of cultural knowledge. Musical education stops at Bartók and Kodály who were emblematic figures in the 1950-60's in Hungary.”* In the esteem of interviewees an association coming from the industry (bottom-up approach) should be implemented which can work on a daily basis embracing all members of the creative class.

6.3.2.10. MUSICAL HUNGARICUMS

Gábor Lepés highlighted some **musical Hungaricums** – besides *classical music*, operetta is very famous and well-known outside of Hungary embracing the stigma of *‘pop-operetta inbound tourism’*. In addition, *gypsy and rockabilly* genres are popular associations with Hungarian music abroad – according to Gábor Lepés the Hungarian band, Mystery Gang was involved in a commercial of McDonalds in 2010 and their artwork is appreciated in the USA.

Gábor Újfalusi supplemented this field by Moog who are a popular band recording their third album in USA, despite the fact that they are not famous in Hungary. In his opinion Hungary has a rich folk song treasure that should be exploited by modern covers of Hungarian musicians too. Furthermore, Balázs Weyer mentioned some representatives of Hungarian folk music who are famous overall the world such as Muzsikás, Sebestyén Márta, Kerekes Band. In addition, *“Hungarian folk dance has been awarded for the UNESCO cultural heritage last year”*, which is an indicator that musical Hungaricums do still exist and valued by international scene as well.

6.3.2.11. HUNGARIAN MUSIC EXPORT

Hungarian music export is an ambiguous part of the research, since the interviewees had different opinions about it. According to Ákos Takács (Red Bull), Hungarian music has a **big potential** and Red Bull has the aim to support it financially with the unsecured interest to appeal to the customers' emotion.

Attila Bátorfy sees this area differently, since in his opinion Hungarian musicians are mostly not different from foreign artists who have the advantage of well-built infrastructure and education system. In his understanding **there are some exclusive talents** who are able to set foot in foreign grounds, but then *“they should not start in Hungary, they have to focus on export countries and maybe later they will recognize that band members are actually originally Hungarians”*.

In Balázs Weyer's opinion *“Hungarian music export is like a mineral resource – it is shiny and beautiful, but no one is planning to initiate some effort about it.”* In his opinion there should be a **holistic organisation** embracing all fields of music export opportunities (place branding, event management, digital improvement, artist and talent management with export goods) in order to get Hungarian music represented in an international environment as well, building a vivid cultural diplomacy for Hungary. When there is a responsible organization behind the Hungarian music scene, those projects should be supported which can be “travelled in a concept”. For instance, Weyer mentioned an illustrative example: *“We should organize a topic like: with cymbal through Central-Eastern-Europe, where musicians from the region could be collected.”*

For the institutional support Weyer finds **MŰPA (Palace of Arts) or other favourable clubs like A38** extremely important: *“these places should build 4-5 regional ‘cultural venue franchise’, which should be working as a quasi-export institution.”* In his opinion, music

export will succeed only, if Hungarian music business professionals could exploit the geographical and cultural aptitudes of the region.

Thus, Weyer sees the power of music export in **unique covers** and **transit among genres**, which is able to engage more fans from other music subcultures as well. For instance, the popular song by Quimby ('Most múlik pontosan') was covered by Csík band, a Hungarian folk band and their original aspect of this song made them extremely popular.

6.3.2.12. TALENT MANAGEMENT IN HUNGARY

Considering **talent management** Jávör Delov and Balázs Fehér suggested that in Hungary there is a wide range of opportunities to participate in a talent show. In every year at least one show is organized by a commercial television to search for fresh talents. In their opinion this phenomenon obviously misleads gifted musicians or singers, since in these shows the best equipment and staff (stylist, engineer, cameraman and so on) are applied which is a scarce phenomenon in Hungary. After these shows talents have to face a less nice picture of Hungarian music scene (e.g. not so well-equipped stages, missing instruments) what they are not exactly prepared for. Jávör shared one of his experiences when he witnessed this side of Hungarian music scene: *"Once my cymbal of the drum equipment was broken and the organizers could not replace it – I had to play during the whole concert without one cymbal."*

The Culture Manager of Red Bull, Ákos Tóth enhanced the importance of music in Red Bull's branding strategy. He described the **cultural strategy of Red Bull** standing on three pillars: *events* organized by Red Bull (not sponsored), targeting *opinion leaders* and *third party* which is not so relevant during the *"egoist marketing"* by creating original Red Bull platforms instead of sponsorship. In the strategic alliance of musicians it is important that their personal characteristics are in harmony with the characteristics of Red Bull (creative, entertaining, extreme). In addition, during the "Made in Garage" concept Red Bull supports new bands to create their first music video by "giving them wings". Several beginner bands turned out to be popular after a partnership with Red Bull and according to Ákos Takács the main aims of the brand is to support local music scenes within global branding strategy.

The **local traditions and cultural heritage** gave an outstanding opportunity for invention of events called 'Liszt Remix' and 'Pílvaker' (see Chapter 5.2.1.3.) where the traditional artefacts from Liszt and literature poems from 1848 were redefined. *"The objective of these events was to create value by respecting Hungarian roots offering relevant content for audience and for musicians as well"*, so they could identify with the event and indirectly with

the brand easily. Ákos suggested he would have never believed that after the unexpected hit of Liszt Remix he could revive another success story, but the history did not just repeat, but surpass it in numbers at least: more than 300 000 people watched the intro video online in three weeks. Red Bull improved the Hungarian music scene by giving artists an opportunity to be different and make difference. In the interpretation of Balázs Fehér, the soloist of Carbonfools (one of the bands participated in 'Liszt Remix' the objective of Ákos Takács was reached, since Balázs said: *"It was such an honour to take part in this event. We enjoyed so much to work with Liszt's art and the venue – Uránia theatre – was a great choice as well to lift the event to a higher level."*

6.3.2.13. HUNGARIAN MEDIA

Hungarian media is another weak point of national music identity, since according to Attila Bátorfy fragmentation and unprofessionalism is featured there. *"There are 15 websites only focusing on electronic music which is undoubtedly too many – in my opinion for just one comprehensive online media there are not enough professional journalists or music experts."*

According to Újfalusi Gábor, there is a quote system in Hungarian radios – a distinct percentage of the played songs should be Hungarian ones. Unfortunately, in television there is no rule about Hungarian cultural support and in case of commercial media it could not be possible in the near future, because ratings are only important factors for their operation.

6.3.2.14. FESTIVAL CULTURE

About **festival culture** all three respondents declared the same vision: Hungarian music festivals are important part of the country branding strategy either forming the musical nation image of Hungary or attracting more and more visitors to the country itself. András Berta, the International Relationship Manager at Sziget Office stated that the total number of visitors was 385 thousand (day tickets) and 50 % of it was bought by foreign visitors, meanwhile week tickets were around 40 thousand and 90% of week tickets was bought by foreign visitors. As a marketing function Sziget Festival has a network of 17 promoters operating in 27 countries especially from tourism or music industry. According to András Berta *"Sziget is the only festival where all type of genres can function next to each other called as the "Festival of Festivals"'*". Besides music, there are many different cultural programmes represented in Sziget, furthermore, Sziget is grown up to an international festival hosting visitors from 60 countries. In addition, Sziget is one of the few festivals that take for one entire week long situated in a touristic destination, Budapest. Although, Sziget seems to be an

important element of forming the city image of Budapest, directly the Hungarian country image as well, there is no support coming from state at least for the rent of the island - the organizers have to subsidize it from other financial resources.

Hungarian culture takes a special role during Sziget Festival in manifestation of Gypsy Stage, Hungaricum Village, and Hungarian Music Stage. Traditional values and traits are represented in Hungaricum Village besides taking a look into the modern music scene of Hungary in the Hungarian Music Stage. Hungarian bands have the opportunity to express their message to a wide variety of audience on the Main Stage, Party Arena, World Music Stage or A38 Stage that are the biggest stages on the festival.

Regarding country image issues according to András Berta Sziget takes an initiative to **influence Hungarian nation image in a positive way**. They attract the youth who are open-minded for new cultures and experiences and if those visitors enriched with new cultural experiences they will spread it to the world voluntarily with the power of social media and word-of-mouth. Despite the cooperation between Sziget Office and Turizmus Zrt the collaborative work should be enhanced in the future in András' opinion, since *"... apparently there is no any other actor besides Sziget participating actively in the international music industry, so Sziget is the only showcase festival of Hungary in this sense."*

6.4. QUANTITATIVE RESEARCH

During the quantitative research phase I designed an online questionnaire in order to map different music consumption behaviours, associations toward music and countries and festival culture in Europe. In the following the survey design will be shortly depicted and after the main results are analysed as well. The whole survey design can be seen in Appendix 5.

6.4.2. DESIGN

The questionnaire design was based on the previous experiences from 2009. I used Qualtrics software to edit and distribute it and SPSS software to analyze data. The survey embodied 19 questions divided by six different blocks:

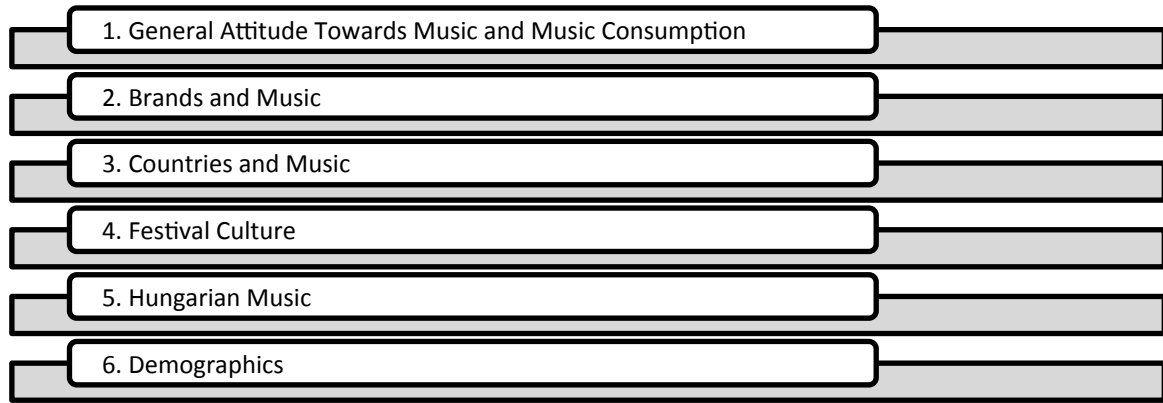


Figure 16: Question Blocks in Survey Design, 2012

Source: Author's edition

The design contained only one open question, because according to past experiences people answered open questions less than multiple choice ones. (*“What do you think about Hungarian music? Please, supplement the statement: Hungarian music is...”*) In addition, I concentrated on the creative approach of questionnaire design – I used pictures to demonstrate associations toward countries and music, besides to evoke some interest in respondents. During the survey I used **Likert-scale** for evaluation of different statements and **semantic differential scale** to place different features of Hungarian music on a scale of seven.

6.4.3. DEMOGRAPHICS

During the virus mechanism I reached **152 respondents** with an average age of 25.52 years and with 53% male and 47% female respondents. 89 of the respondents came from Hungary, building up for 55.89% of the population. Other answers came from Switzerland, Germany, Indonesia, Denmark, Netherlands, US, UK, Belgium, Spain, Portugal and 1-1- respondents from Australia, Afghanistan, Zimbabwe, South-Korea etc. University students and career entrants mostly engaged in management or business related jobs are in majority of the given population depicted in the following figures. The data is not representative for the whole population, but accordingly some generalization for the university students and entrants can be drawn.

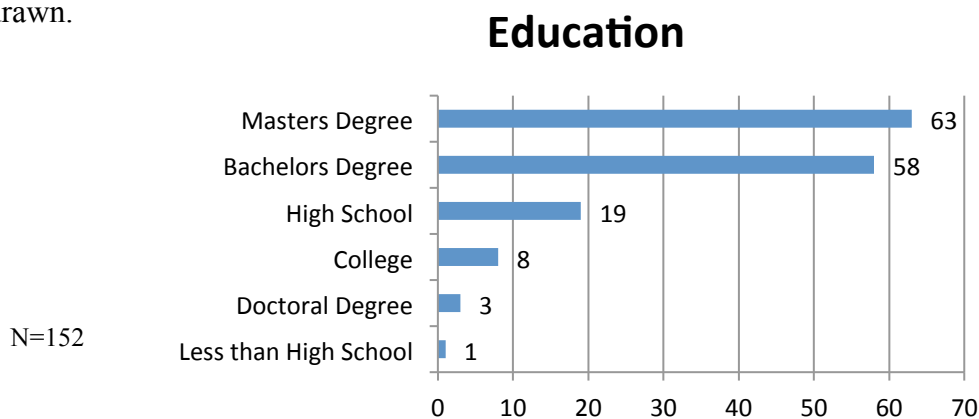


Table 3: Highest Education among Population

Source: Author's Edition

Occupation

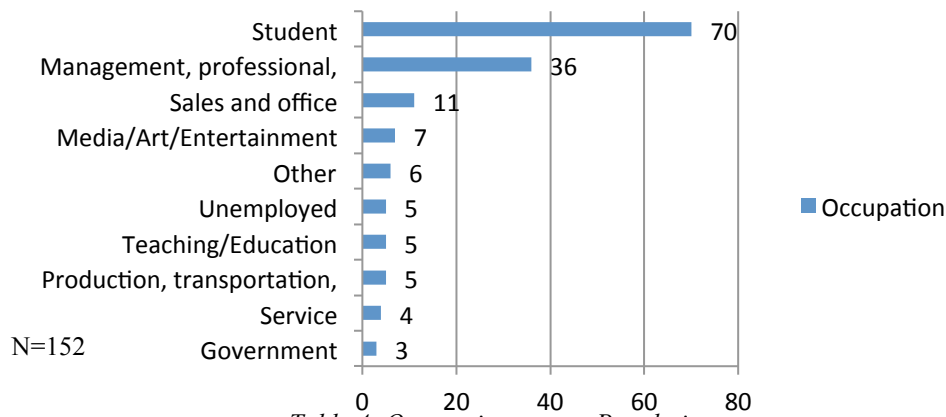


Table 4: Occupation among Population
Source: Author's edition

6.4.4. RESULTS

6.4.4.1. GENERAL ATTITUDE TOWARDS MUSIC AND MUSIC CONSUMPTION

First, the role of music was revealed playing an important part in people's lives depicted in the following chart. From 535 answers the majority said that music meant for them entertainment, emotions and relaxation followed by party and mood. In the 'other' dimension there were only positive associations mentioned like "*Music means the whole life to me.*" So is the *emotional effect* of music confirmed which is crucial for music branding and for country branding as well.

Role of Music

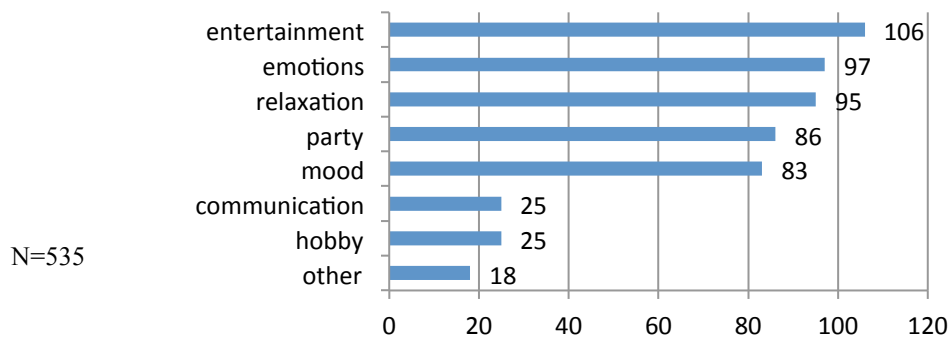


Table 5: The Role of Music
Source: Author's edition

For music consumption it can be concluded that the majority of the given population listens to at least 1 hour music per day (see Appendix 10.) mostly to pop, rock and electronic music strengthening the group of 'delicates' identified in the focus-group interviews. Here I could distinguish between 'dedicated' (47% listens to music more than one hour per day) and 'neutral' (53% listens to music one or less than an hour). Among "other" answers some niche music genres (like world and folk music) were mentioned highlighting the importance of traditions and national identity in music as well.

Music Genres (in %)

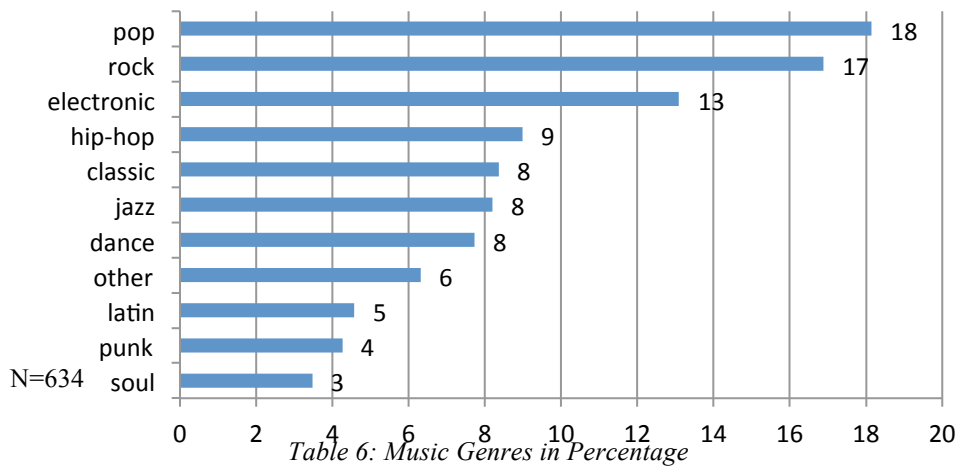


Table 6: Music Genres in Percentage

Source: Author's edition

6.4.4.2. BRANDS AND MUSIC

In Brands and Music block I focused on the relationship between music and brands in commercials. For that I asked respondents to match the given artists to a specific brand according to their associations and memories. As a result *most of the respondents could not pair the given names and brands* despite the conclusions of qualitative method where audio files were used, not just supported associations. The following ranking of brand and artist relationships revealed during my analysis in the first six places:

Ranking	Brand	Artist	Right Answer
1	Coca-Cola	David Guetta	60
2	Coca-Cola	Natasha Bedingfield	48
3	Chrysler	Jay-Z	42
4	Sony Bravia	José Gonzales	
5	Nokia	deadmau5	27
6	Google Chrome	OK	21

N=152

Table 7: Associated Brands and Musicians

Source: Author's edition

Coca-Cola was associated mostly with the right artists in the first two places. Coca-Cola is well-known about its emotional branding strategy where music plays a crucial role. For instance, in summer time Coke Club in Hungary offers concerts and other music events. For the relationship between U2 and Blackberry; Madonna and Microsoft; Lady Gaga and Kodak; and Cee Lo Green and Absolut Vodka the results were so marginal (at the most 10 respondents), that in my opinion those answers are only due to coincidence.

As a result it can be concluded that the ‘dedicated’ group answered this question significantly better than their ‘neutral’ colleagues: their associations with brands were radically stronger - 82% of the correct answers came from the dedicated group.

Considering *music services*, YouTube is the most well-known - 100% usage can be noticed in its case. The next one is iTunes, although the usage rate is much lower, only 65 % which could be drawn to the business model of iTunes where you have to pay in order to download a song. Spotify as a new rising star is on the sixth place, although due to the high entry barriers (it can be used in only a few countries by now) only 39 percent use it yet.

Service	Awareness	Usage	%
YouTube	147	147	100
iTunes	143	93	65
Myspace	122	63	52
torrent sites	112	80	71
Vevo	79	54	68
Spotify	70	27	39
Soundcloud	65	50	77
Google Play	38	6	16
Yahoo Music	36	7	19
Rhapsody	23	4	17
Deezer	19	11	58
Other	n.a.	18	

N=560

Table 8: Music Service Awareness and Usage

Source: Author's edition

6.4.4.3. COUNTRIES AND MUSIC

The next question block focused on associations between countries and musicians. The countries chosen for further analysis was based on the Global Creativity Index (Florida, 2011) and global sales of artists available on Wikipedia. The festival names were chosen according to the NME Festival Award (2012) nominations, focusing on European Festivals. Respondents were asked to match the pictures of artists with the given countries - they had to drag the picture with their mouse to the group of countries.

The strongest association can be noticed in case of Beatles who are the founders of pop culture strongly related to their country of origin, the United Kingdom. (143 respondents of 152 proved it) Then the Italian singer, Eros Ramazotti came with 140 respondents followed by the Russian pop singers, Tatu being ranked on the third place which result may be due to the fact that they sang usually in their mother tongue. On the last places Manu Chao with its double nationality and Boney M. with German roots were identified – they sang in English as being internationally associated, not strongly to their country of origin.

N=152



Figure 17: Associated Countries with Music

Source: Author's edition

Likert-scale was used in order to uncover the attitudes toward music and Hungarian music. For the attitude towards music and countries from the following table I found that respondents are in **close relationship with music** by valuing 5 (totally agree dimension) in most times in the following statements: “*Music plays an important role in my life*” and “*I could not imagine a life without music.*” For the power of music in a country branding context slightly weaker results came out, but they still suggest that according to the respondents “*Musical events are good touristic attractions*”, **government** has a role in supporting local musical events and people should study music. For the direct relationship between countries and music the mean was 3.6 on a scale of 5 with 4 in median and modus – this suggests that most of the **respondents can see a linkage between a country’s music and its image**.

Statement	Mean	Median	Modus
I do not like musical events	1,76	1	1
I do not belong to a music subculture	2,93	3	4
I often go to concerts	3,09	3	2
<u>Music plays an important role in my life</u>	<u>3,99</u>	<u>4</u>	<u>5</u>
I usually remember on songs played in commercials	3,27	3	4
Music is more important for me than movies	3,21	3	4
<u>I could not imagine my life without music</u>	<u>4,2</u>	<u>5</u>	<u>5</u>
<u>Musical events are good touristic attractions</u>	<u>3,97</u>	<u>4</u>	<u>4</u>
<u>Government should support musical events</u>	<u>3,65</u>	<u>4</u>	<u>4</u>
<u>People should study music</u>	<u>3,62</u>	<u>4</u>	<u>4</u>
<u>Music influences the picture of a country I have in my mind</u>	<u>3,60</u>	<u>4</u>	<u>4</u>

N=152

Table 9: Evaluation of Statements

Source: Author's edition

6.4.4.4. FESTIVAL CULTURE

By Festival Culture question block the given population was divided into two subgroups: 1. **Festival visitors** (126 people) and 2. **Non-visitors** (26 people). The main motivation of festival visits was the attraction of musicians, party and friends. (See Appendix 11.)

Since the population is dominant by Hungarian respondents (in 55%), the mostly known festival was Sziget followed by Glastonbury, Rock am Ring and Exit. These festivals were supplemented among other mentions by the Danish Roskilde and some local festivals like Openair St. Gallen, Balaton Sound etc.

Festival	Awareness	Visitors	%
Sziget (Hungary)	125	70	56
Glastonbury (UK)	87	3	3
Rock am Ring (Germany)	77	3	4
Exit (Serbia)	60	5	8
Tomorrowland (Belgium)	36	0	0
Pinkpop (Netherlands)	26	3	12
Open'er Festival (Poland)	22	1	5
Melt! (Germany)	19	6	32
Pohoda Festival (Slovakia)	16	1	6
Rock for People (Czech Republic)	9	2	22
Total	477	150	

Table 10: Music Festival Awareness and Visits

Source: Author's edition

6.4.4.5. HUNGARIAN MUSIC

Considering Hungarian music, the first question was a spontaneous association with Hungarian music where the following results turned out:

Spontaneous Associations Toward Hungarian Music

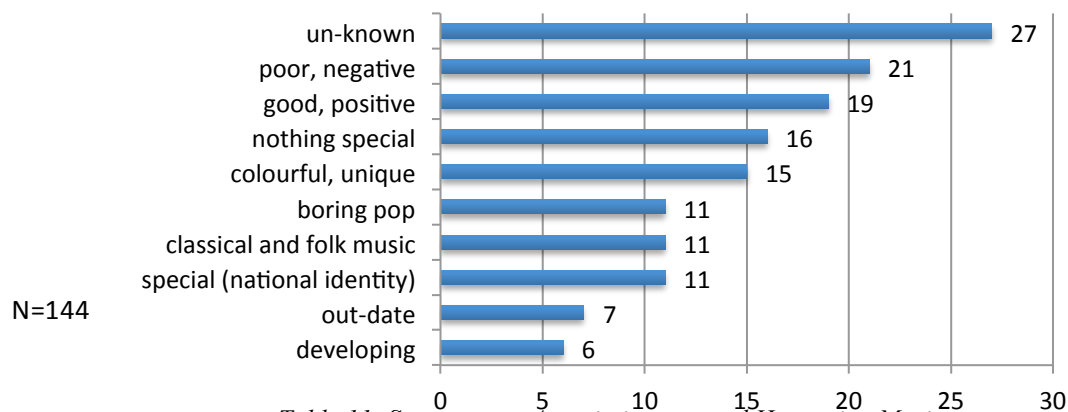


Table 11: Spontaneous Associations toward Hungarian Music

Source: Author's edition

Mostly the respondents did not know about Hungarian music or they had **negative associations** towards it. ('poor', 'nothing special', 'out-date', 'boring pop') Although there are some **positive associations** toward the quality of music and the national identity what makes Hungarians feel to be **special** (traditional roots and language were mentioned in this dimension). Unfortunately, pop music is underdeveloped and boring according to the respondents, but they can see an opportunity in **underground music scene, folk and gypsy** music besides classical music representatives from history. The uniqueness of Hungarian music was manifested in the group of 'colourful' where there was an answer: *"You can find any kind of music genre here in a wide variety of places which makes Hungary so different from other cultures."*

Furthermore, I asked the subjects to evaluate Hungarian music on a semantic differential scale of seven degree. The main results are differentiated according to their country of origin (Hungarian or Foreigner and Overall results).

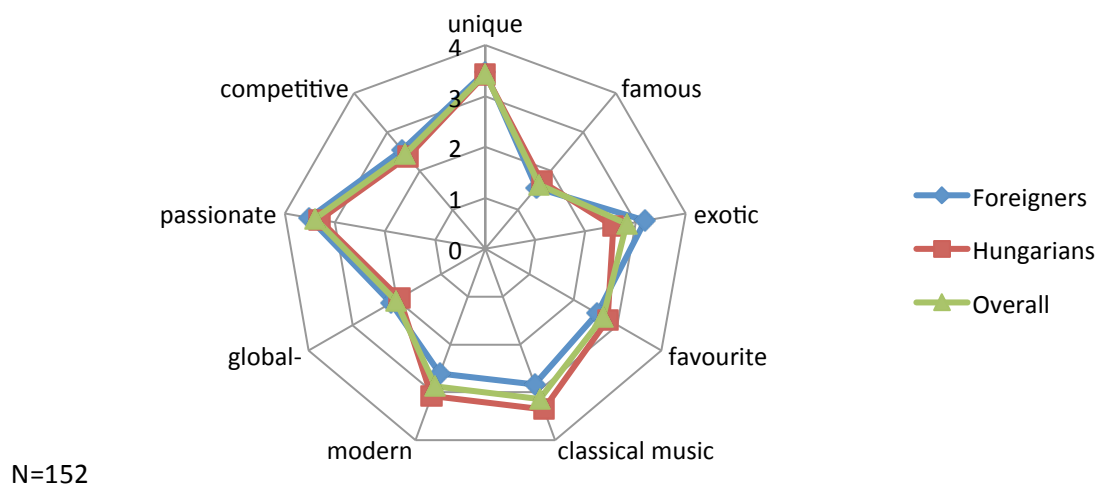


Figure 18: Hungarian Music according to the Population
Source: Author's edition

The results suggest that **Hungarian music is not well-known** and more **local** than global with the absence of Hungarian music export. When I analysed the group of foreign people it revealed that in their estimation the country's music was more unique, exotic, passionate, but less global and modern either, moreover unfortunately non-competitive. Foreigners associated more Hungarian music with gypsy music that points to the fact that world music is one of the genres Hungarian musicians may be successful outside of the country's borders.

6.4.4.6. CORRELATIONS IN THE QUESTIONNAIRE

For uncovering correlations I used ANOVA tests in SPSS. (See results in Appendix 13) For some **demographic characteristics** (age, highest education, occupation) I could not find any significant correlations. Furthermore, according to other factors, (gender; country of origin; whether the respondents have visited Hungary or any music festivals; how often respondents have visited a music festival; and whether respondents are members of a dedicated or neutral group) there is a relationship between the elements of Likert-scale and of the semantic-differential scale.

First of all, I had to transform some variables in the SPSS data. For instance, for country of origin variable has to be recoded into two groups: Hungarians and foreigners and according to music consumption behaviour I generated dedicated and neutral variables. In the following I will depict the main correlations found in the questionnaire.

According to **gender** ANOVA tests showed that male respondents were more positive (72% agree or strongly agree) about the influence of music on country image, meanwhile female were more critic about Hungarian music indicating it as unknown (82% marked 4 or more on the semantic differential scale).

Who have visited Hungary stated that Hungarian music is more classical than gypsy. This result is in close relationship with Hungarian answers, where 40% of the Hungarian respondents said that Hungarian music is classical music; meanwhile this association was confirmed by only 10% of the foreign respondents. Most of the foreign respondents mentioned that Hungarian music is more likely associated with gypsy music in their mind. It shows a negative internal reputation of gypsy music which may have different causes. On a higher level Florida's (2011) low tolerance index can be considered as the root of bad reputation of gypsy music. On the other hand, the traditional image of Hungary (Steppe, Goulash etc.) could be denied in picture of gypsy music by the creative youth. This phenomenon was confirmed by ANOVA test and crosstabs by 0,018 of significance level of Chi-Square tests.

For '**dedicated**' group the importance of music was significantly stronger with ANOVA and Crosstabs in statements: *"I do not like musical events"*, *"I do not belong to a music subculture"*; *"I often go to concerts"*; *"Music plays an important role in my life"*; *"Music is more important for me than music"*; and *"I could not imagine my life without music"*.

Interestingly, the ‘dedicated’ group observes the influence of music on country image on a higher level too. This result strengthens the effort of targeting members of creative class (creative tourists, musicians) during country branding activities based on music.

Festival visiting seemed to be an indicator of ‘dedicated’ group where the above mentioned statements at ‘dedicated’ group stood in strong correlation with increasing frequency of festival visiting. However, the more often respondents visit a festival, the more attractive they see it from a touristic point of view, which is due to higher numbers of music festivals visiting abroad. Hungarians (85% to 70% foreigners) think that musical events are good touristic attractions where the effect of Sziget festival can be noticed as being the only international showcase of Hungary.

Among 70% of **Hungarians** the government has a crucial role in financing musical events which reflects the model of Söndermann (2007) depicted in Chapter 4.2., meanwhile only 49% of foreigners think the same. Hungarians had a stronger opinion about music education: 65% compared to 40% of foreigners suggested that people should study music. These results show that Hungarians expect more from the government especially in case of cultural diplomacy. Hungarian musical nation image is much stronger among inhabitants, which show a relatively strong national identity in case of Hungary with musical characteristics like exotic and modern.

6.4. SUMMARY OF PRIMARY RESEARCH

A summary of results are depicted in the following figure where all the conclusions from primary research are included.

In-depth Interviews	Focus Group Interviews	Questionnaire
Hungarian country image: Pessimist picture because of politics and different messages for "creative tourists" and "static tourists". "Creative tourists" are not targeted nowadays.	Two groups were identified according to music usage: 'delicate' and 'neutral'	Music and brand associations are weak. 'Dedicated' group could match brands and bands significantly better.
Hungarian cultural diplomacy is a missing attempt. It should be developed through regional institutional franchise in a holistic approach.	Brand and music associations are strong in national music identity. (for instance Hungarian song of Quimby)	Music and country associations are strong. Especially artists with local language lyrics are the
Hungarian music education is static, it should be developed like in case of Sweden.	Countries and their pop icons are associated well enhancing the opportunity for country branding based on music.	Government should take initiative to support music culture. Hungarians see the role of government significantly on a higher level.
Hungarian music export is weak, although there are some exclusive talents - a holistic organization is needed.	Musical spontaneous associations are discovered in countries with strong cultural diplomacy like UK, USA and Sweden	Festival culture is diverse. Sziget appears as a touristic attraction, especially among Hungarian respondents.
Musical Hungaricums are mostly folk and gypsy music, popoperetta and rockabilly, moreover the original approach of covers by building a transit among genres.	Budapest appears as a creative city with its uniqueness and original places like ruin bars, spas and active nightlife.	Hungarian music is mostly exotic, unique and passionate. Some genres like gypsy and folk music were mentioned by foreigners, meanwhile Hungarian associated Hungarian music mostly with classical one.
Festival culture is diverse – it strengthens National Music Identity by building social welfare	Message is unclear in case of „World of Potentials” country image campaign.	Past research: Hungarian cultural diplomacy has a lot of potentials in case of music export or other cultural goods as well. (like gastronomy)
Sziget is the only musical showcase of Hungary now.	No strong musical country image in case of Hungary – only in National Identity. There is space for improvement in music export, especially in world and underground music.	

Figure 19: Summary Table of Results in Primary Research

Source: Author's edition

6.5. LIMITATIONS AND FURTHER RESEARCH DEVELOPMENT

In the focus group interview a sample based on music consumption behaviour could be applied in future distinguishing between ‘dedicated’ (listening to music more than an hour per day) and ‘neutral’ (listening to music less than an hour).

Further research development could focus on **creative elements**, since the nature of topic requires customer insights. According to some feedbacks, the survey was evaluated by one of the mediators in the viral effect: *“I promise you, it's the most interactive survey you've seen in a while!”* For creative elements audio and video files could be embedded into the survey, although there is a risk that the willingness of filling in the survey will consequently decrease, since there are several situations when sounds are limited.

In addition, the focus should divide into two target groups with two personalized survey design for improving response rate: 1. International music image for Hungary in Hungarian, 2. External music image for Hungary in English.

7. Conclusions and Suggestions

The key question in my paper was how music is able to influence the country image. The nature of the topic required a holistic view of country branding, where I synthesised different theoretical approaches (creative class, cultural diplomacy and country branding), which were not applied and connected to each other before according to my secondary research. As a result I found the following conclusions.

Music is a **determinant factor** in people’s life, so the results of focus group interviews and the survey confirmed. Music determines our mood and helps us to find some relaxing moments in our stressful life besides being a form of entertainment as well. Music enhances the message of a video and influences the recall of any advertisements by building an emotional bond.

Country branding is more appreciated in today’s economy considering two tendencies: globalization and localization. Meanwhile, the world converges to global values such as freedom and equity without any geographical distance, there is still a gap between societies waiting to be bridged by local service and values like tradition, language or local artefacts and cultural traits. In this paradox, countries need to differentiate themselves in order to stand out from the crowd of globalized world. One of the most effective tools for successful country

branding involves cultural values building a national identity built on domestic views heading to the solution of finding an international competitive advantage.

Today's economy is suggested to be an experience economy accompanied by the new trend of sharing economy where cultural artefacts and creative class (Florida, 2002) play a crucial role. In place branding, creative class is one of the most important target groups embracing all university students, technological professionals, business management besides artists. (Zenker, 2011) Furthermore, creative cities and places arised (Florida, 2011) increasing the national GDP and the reputation of a country.

As I featured the research questions in Chapter 2, I found the following answers after my secondary and primary research:

Q1: What is the cultural aspect of country branding in today's' economy?

A1: Anholt-hexagon depicted in Chapter 4.1. and the importance of creative class.

Q2: How can the creative class build competitive advantages for country branding?

A2: Creative class is one of the target groups of country branding. See Chapter 4.2.

Q3: What are the main platforms of musical nation image?

A3: Event, institutional, artist, place, digital. Depicted in Chapter 5.2.

Q4: How can music influence the nation image in terms of Anholt-hexagon?

A4: Music influences every ace of the Anholt-hexagon (2003) in form of cultural diplomacy, the creative class, musical platforms and innovative solutions. See Chapter 5.3.2.

Q5: Does Hungary have a musical nation image?

A5: Yes, Hungary has a musical nation image, although it is momentarily weak and has several problematic areas (depicted in Chapter 5.3.2.). According to international examples, Hungary could build a country branding strategy on music, which is moving forward from traditional values into the direction of modern understanding of a creative country.

Q6: How can Hungary improve its musical nation image?

A6: Hungary can improve its musical nation image in several ways, depicted in Chapter 7.

Through the primary and secondary research it was confirmed that **music has a crucial effect on country image** by mediating through five main platforms. These platforms integrate the *place* as a creative city or country itself; the *artist* as a symbolic icon; any *digital platforms* where the message can be communicated in an innovative way; *events* where icons and visitors can contact; and the *institutional background* that supports the international musical network of a country through cultural diplomacy. In case of Hungary the following dimensions can be differentiated according to the Musical Nation Image based on the Anholt-

hexagon (2006): where *the cluster of the creative class*; *Budapest as a creative city* fuelled with ruin bars and spas as '*Musical Hungaricums*'; the *Sziget Festival* as an international showcase; and *innovation* in public music education, infrastructure and location-based technology play the most important roles. In addition, in case of Hungary a *relative strong Musical Nation Identity* appeared in forms of classical and folk music fuelled with uniqueness, traditions and exotic characteristics, which can be the baseline for improving the external country image.

In order to **improve the musical image of a country** (See Figure 20.), it is essential to divide the **internal and external country image** and to identify their tools. The main musical platforms have to be analysed by referring the strengths and weaknesses of the country itself. Furthermore, creative class as an essential target group of internal and external country image should be identified as well. Engaged apostils need to be found who are willing to put tons of work and resources in the **cluster of creative class** (investors, musicians, artists). University students and professors, moreover, research centres of R&D activities have to be connected to this network in order to improve innovation activities and modernization of pop culture.

There is a general pessimist attitude toward Hungarian music, although several studies (Florida, 2011; ACRE, 2010; primary research) show that creativity, uniqueness and talent can be found in Hungarian music. First of all, the **Hungarian Musical Nation Image** should be improved in the minds of Hungarian residents by further development music education. Music education is still suppressed by the dominance of classical music and practical tasks that should be embarrassing for an untalented person. In my opinion in the future Hungary should move to the Swedish music education model where musical education is a crucial part of public education by letting students to play at least one instrument and study the history of modern music as well as respecting the national heritage of their own culture.

The **infrastructure** of music industry technology and modern instruments is not built out in Hungary. In addition, an enormous chaos prevails in Hungarian media connected to music as well where fragmentation and incoherence play the biggest role. In order to assure direct access to media distribution channels, powerful media institutions (digitally mostly) have to be established with a transparent professional team and knowledge. Musical Identity needs to be discovered in new genres associated to the country and musical talents have to be found who can be differentiated through iconic branding and who have both the international and professional knowledge for representation of a country abroad.



Figure 20: Suggestions for Improving Country Image Strategy Built on Music

Source: Author's edition

Cultural diplomacy in case of Hungary is still a missing instrument – this aspect should be built into government actions as a country branding tool. In case of Hungary a regional cultural diplomacy attempt would be welcomed by building out a professional network based on music either in a form of an institutional franchise or a thematical approach of regional music branding. Furthermore, under the holistic view of country branding, other cultural fields should be involved in a more powerful cultural diplomacy like literature, dance and fine arts.

After all, the creative class should be embraced in a **holistic approach** where every member of the class has its own role how to be a useful member of the online and offline creative community. Tourism professionals will play a crucial role by engaging the strategy of Hungarian tourism in the direction of creative country where Budapest as a creative city and music destination could be developed. For that Hungary already owns unique places such as ‘ruin bars’ and ‘spas’ as ‘Musical Hungaricums’, however different national talents should be found either by talent shows or venture capitalists in order to create the Hungarian music export. For that world and gypsy music can be a solution according to my primary research.

In the last step **international music events** have to be generated as musical showcases for the given country. In case of Hungary only Sziget Festival is able to fill this vacancy, but in my opinion regional or international music industry conference should be organized by embracing the Hungarian music business atmosphere. A great attempt is the negotiation for organizing

WOMEX in five years in Hungary, which should help to lead musical country branding in the right direction. However, for this ambitious objective an effective international cultural diplomacy could prepare the ground by providing international network opportunities and developed infrastructure. So the soft power of music can improve a nation's image among residents by the offer of Musical Nation Identity mediating the message of belonging and respect of traditions; and among tourists or foreign investors the message of a culturally original and creative country of innovative opportunities for the future.

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Appendix 1: The Global Creativity Index (Florida, 2011)

Overall Global Creativity Index rankings

Appendix E

TOTAL RANK	COUNTRY	TECHNOLOGY	TALENT	TOLERANCE	GLOBAL CREATIVITY INDEX
1	Sweden	5	2	7	0.923
2	United States	3	8	8	0.902
3	Finland	1	1	19	0.894
4	Denmark	7	4	14	0.878
5	Australia	15	7	5	0.870
6	New Zealand	19	5	4	0.866
7	Canada	11	17	1	0.862
7	Norway	12	6	11	0.862
9	Singapore	10	3	17	0.858
10	Netherlands	17	11	3	0.854
11	Belgium	16	12	13	0.813
12	Ireland	20	21	2	0.805
13	United Kingdom	18	19	10	0.789
14	Switzerland	6	22	20	0.785
15	France	14	23	16	0.764
15	Germany	9	26	18	0.764
17	Spain	24	28	6	0.744
18	Taiwan	—	32	21	0.737
19	Italy	26	18	23	0.707
20	Hong Kong	22	37	12	0.691
21	Austria	13	30	35	0.663
22	Greece	38	9	37	0.638
22	Slovenia	23	10	51	0.638
24	Serbia	28	35	27	0.614
24	Israel	4	20	66	0.614
26	Hungary	33	25	34	0.606
27	Republic of Korea	8	24	62	0.598
28	Portugal	32	34	33	0.577
29	Czech Republic	25	31	49	0.553
30	Japan	2	45	61	0.541
30	Russian Federation	21	13	74	0.541
32	Costa Rica	43	42	26	0.528
32	Estonia	27	15	69	0.528
34	Latvia	39	14	60	0.520
35	Croatia	29	39	46	0.516
36	United Arab Emirates	—	49	38	0.513
37	Uruguay	63	46	9	0.500
38	Argentina	55	36	31	0.484
38	Lithuania	31	16	75	0.484
40	Bulgaria	40	38	45	0.480
41	Slovakia	36	33	55	0.476
41	Poland	37	29	58	0.476

TOTAL RANK	COUNTRY	TECHNOLOGY	TALENT	TOLERANCE	GLOBAL CREATIVITY INDEX
43	Nicaragua	—	69	24	0.474
44	Cyprus	59	43	25	0.463
45	South Africa	45	68	15	0.459
46	Brazil	41	66	22	0.455
47	Chile	48	54	28	0.451
48	Malaysia	54	50	29	0.439
49	Ukraine	34	27	77	0.419
50	India	42	75	30	0.382
51	Panama	65	52	39	0.346
51	Romania	49	63	44	0.346
51	Macedonia	61	47	48	0.346
54	Philippines	52	64	41	0.341
54	Armenia	46	61	50	0.341
54	Kazakhstan	60	40	57	0.341
57	Georgia	47	48	63	0.337
58	China	30	76	—	0.327
59	Ecuador	72	58	32	0.321
60	Bolivia	66	44	53	0.319
61	Mexico	62	65	36	0.317
62	Egypt	—	41	76	0.316
63	Sri Lanka	69	55	42	0.305
63	Trinidad and Tobago	53	70	43	0.305
65	Kyrgyzstan	50	53	65	0.297
66	Peru	56	62	53	0.287
67	Uganda	35	79	59	0.276
68	Turkey	51	59	64	0.272
69	Mongolia	—	51	73	0.270
70	Azerbaijan	44	67	72	0.236
71	El Salvador	67	73	47	0.220
71	Thailand	64	56	67	0.220
73	Jamaica	57	60	71	0.215
74	Honduras	58	77	56	0.203
75	Madagascar	70	82	40	0.199
76	Saudi Arabia	—	57	79	0.191
77	Paraguay	71	72	54	0.179
78	Iran	—	71	68	0.171
79	Viet Nam	68	78	70	0.102
80	Pakistan	73	74	81	0.053
81	Indonesia	74	80	78	0.037
82	Cambodia	75	81	80	0.020

Appendix 2. Focus Group Interview Guideline

1. Introduction

Short introduction of group members. Occupation, nationality, age, hobbies

2. General Attitudes Toward Music and Music Consumption

- a) What does music mean to you?
- b) How often do you listen to music?
- c) What is your favourite genre/band/musician?
- d) What is the country of origin of the music you listen to the most?
- e) How do you listen to music? In what situations? Background music or concentrated
- f) Do you own a mobile music device? (iPod, mp3 player, smart phone whatever)
- g) Do you use any online music service? Which ones? (YouTube, Deezer etc.)

3. Music Branding – association (spontaneous) – creative task: match audio files

Company	Musician	Song	URL
Sony Bravia	José Gonzales	Heartbeats	http://youtu.be/R_kLwQJUqYU
Coca-Cola	David Guetta		http://youtu.be/Ps572zm1-OI
Coca-Cola	Natasha Bedingfield	Shake Up Christmas	http://youtu.be/8unjqejs2s
Nokia	deadmau5		http://youtu.be/L-Fk0_WKVi8
Google Chrome	OK	Pilobolus	http://youtu.be/ur-y7oOto14
Absolut	Cee Lo Green	Distilled	http://youtu.be/ur-y7oOto14
Chrysler	Jay-Z	Heart of the City	http://youtu.be/re0zFRfRXu0
Kodak	Lady Gaga	Poker Face	http://youtu.be/bESGlojNYSO
Microsoft	Madonna	Ray of Light	http://youtu.be/redTxFT-GLk
Blackberry	U2	Blackberry Loves U2	http://youtu.be/qx_wdg-BSaY
Túró Rudi (for Hungarians only)	Quimby	Láss ezer csodát!	http://youtu.be/lmLZOCh_h5k

4. General Attitudes toward Countries – association (spontaneous)

UK, US, Hungary, Sweden, Russia, Colombia, Finland, Spain, Italy, Australia, Germany, Canada

5. Musical Associations toward Countries (spontaneous)

UK, US, Hungary, Sweden, Russia, Colombia, Finland, Spain, Italy, Australia, Germany, Canada

6. Supported Musical Associations toward Countries – creative task: Match pictures, match audio files



7. Festival Culture and Visiting

- Do you visit any festivals? What kind of festivals?
- Do you visit any music festivals? Name some of them.
- Why do you go to those festivals? What do you like in those festivals?
- What does festival mood mean to you? Please do a collage.
- Which of the following music festivals have you already heard about?
- Which one would you like to visit?

8. Hungarian country image – general attitudes

- Have you been to Hungary already?
- What do you think about Hungary?
- Hungarian people
- Do you think that Hungary is a country of talents? Why?
- Show Hungarian country image video about talents

9. Hungary and music

- Do you listen to Hungarian music? Which artists and genres?
- What is important for you in Hungarian music? Why is it different?
- Do you think that Hungarian music is exportable? Why?
- Who should be the representative of Hungarian music? Why?

Appendix 3. Short Introduction of Interviewees

BÁTORFY, ATTILA:

Attila is a journalist working currently at Kreatív Magazine, the most well-known marketing communication professional magazine in Hungary. He finished his studies at ELTE and his special interest is electronic music. He already wrote articles for Quart.hu and got awarded for Quality Journalism in December 2011.

BERTA, ANDRÁS:

András is the International Relationship Manager at Sziget Office, the biggest major festival in Hungary. Formerly he worked at Program for the National Popular Culture and Music as a program director.

DELOV, JÁVOR:

Jávor is a drum player in Turbo and Random Trip. He finished his studies at Music Academy of Ferenc Liszt. Random Trip is a group of musicians who play with guest musicians improvisation music and their success is greater and greater. He played in the band of SP in Megasztár in 2012 as well.

FEHÉR, BALÁZS:

Balázs is the soloist of a popular band, The Carbonfools playing psychedelic techno rock with new wave, blues or turbopolka genres. He was nominated for Best Singer Award at Viva Comet 2012 and last year they played in X-faktor as well.

LEPÉS, GÁBOR:

Gábor is a full member of music society, since he is a mixture of a musician, manager, producer and engineer. He plays in the band of Balkan Fanatik who provided the music of country image film of “Hungary – the World of Potentials”, besides he works with Ákos, one of the most famous artists in Hungary who already was awarded several times and has a past of 20 years of music experience.

TAKÁCS, ÁKOS

Ákos is the Cultural Manager at Red Bull Hungary, being responsible for musical events such as Liszt Remix and Pilvaker. Culture, especially music plays a crucial part in Red Bull’s strategy – Red Bull has its own music platform called Red Bull Music Academy.

ÚJFALUSI, GÁBOR:

Gábor is Director at Hungarian Institute for Culture and Art. The Hungarian Institute for Culture and Arts was established in 1951 as a background Institute for the Ministry of Education and Culture. Now it's the supervisory body of the Ministry. It has 90 employees, and it is connected to thousands of local cultural institutions around Hungary. (Available: www.mmikl.hu. Retrieved: March 2012)

WEYER, BALÁZS:

Balázs is a journalist, leader of 'Főszerkesztők Fóruma' and editor in chief of Origo until 2011 fall which was originally established by him as well. (Origo is one of the main online news portal in Hungary) He worked for Magyar Narancs, RTL Klub in last two decades as editor. As musical journalist he wrote for Quart and nowadays he is the member of the jury of Quality Journalism Foundation and the valuable member of Hungarian Content Provider Association. Currently his research at University of Sheffield World Music Studies is focusing on the cross-section of ethnomusicology and marketing communication. Besides he is involved in promoting Hungarian folk and world music by creating soundscapes of cities.

Appendix 4. Interview Guideline for Attila Bátorfy (Kreatív Magazin) and Weyer, Balázs (Origo)

Introduction – short CV, profession, favourite music

1. Music trends

- a) What are the ongoing trends in the music industry today? Which are beneficial and which are disadvantageous?

2. Country image of Hungary

- a) What is the Hungarian country image in your opinion?
- b) Do you know any country image campaigns of Hungary or any other nations?
- c) What can foreign visitors think about Hungary?
- d) What are the strengths and weaknesses of Hungary?

3. Hungarian cultural diplomacy

- a) What do you think about Hungarian cultural diplomacy?
- b) About music education?
- c) About music innovation?

4. Creative class

- a) Have you heard about the term of creative class? What do you think about it?
- b) I will show the ranking of the Global Creativity Index. What do you think about it? Why could Hungary be overall 26th and 32rd place in technology, 20th place in talent, 24th in creative class, and 33rd in tolerance rankings?
- c) Is there a cluster of creative class in Hungary?
- d) If there was, what would it give to the reputation or development of the country?
- e) Music innovation

5. Hungarian music

- a) What do you think about Hungarian music? What are the strengths and weaknesses of Hungarian music? Any opportunities?
- b) What are the characteristics of Hungarian music?
- c) What is the role of talent management in shaping Hungarian music?
- d) Do you think there is any (or more) Hungarian musician(s) who could be icons for Hungarian country branding? Who?

6. Hungarian music export

- a) What do you think about Hungarian music export?
- b) Who is responsible for Hungarian music export? State/individual musicians/management/music professional organizations? How could it be improved?

7. Hungarian media

- a) What does the Hungarian media scene like from music perspective? (TV, radio, online, print) What is missing, what should be improved?
- b) Should public radios and TV channels be responsible for building a musical nation image?

8. Festival culture

- a) What is the Hungarian festival scene look like?
- b) How can a festival mediate/influence the image of a country?
- c) What is the added value of Sziget?
- d) How can build Sziget the Hungarian image?
- e) In your opinion can Sziget change the associations toward Hungarian music and Hungarian music export?

Appendix 5. Interview Guideline for Ákos Takács (Red Bull Hungary)

Introduction – short CV, profession, favourite music

1. Red Bull and branding

- a) What is the main branding strategy of Red Bull? Who is the target group? What is the message of the brand?
- b) What are the elements of branding strategy? (web site, own magazine, other media platforms, sport, culture etc.)
- c) What are the differences between global and local branding strategy?

2. Red Bull and music

- 9. How is music and Red Bull related?
- 10. What can Red Bull mediate through music?
- 11. How does Red Bull use the power of music? (events, sponsorship, media)

3. Red Bull and musical events

- a) What kind of musical events were organized by Red Bull lately?
- b) Could you tell me please more about the concept of Liszt Remix! How did this idea come to your mind? How did you choose the bands? What was the main target group and message of the event? What was the promotion strategy? How successful was the campaign and the event?
- c) Could you tell me more about the concept of Pilvaker! How did this idea come to your mind? How did you choose the bands? What was the main target group and message of the event? What was the promotion strategy? How successful was the campaign and the event?
- d) Do you think that music is able to change the reputation, associations toward a brand in customers' mind? Why?

4. Country image of Hungary

- e) What is the Hungarian country image in your opinion?
- f) Do you know any country image campaigns of Hungary or any other nations?
- g) What can foreign visitors think about Hungary?
- h) What are the strengths and weaknesses of Hungary?

5. Music – Red Bull – Country Image

- a) Do you think that music branding of Red Bull is able to build the national music identity (internally)? Is there any strategic attempt from the side of Red Bull to do it so?
- b) What other measures should be taken in order to build Hungary's national music image either internally or externally in your opinion?

Appendix 6. Interview Guideline for András Berta (Sziget Office)

For András Berta I used the same guideline as for Attila Bátorfy and Balázs Weyer, but I supplemented it with the following specific questions:

+ 1 field according to his profession: Sziget Festival

1. How many foreign visitors do come to Sziget Festival?
2. How does Sziget Office attract foreign visitors?
3. What is the added value of Sziget?
4. What is the USP of Sziget Festival? Why is it different from any other festivals in Europe?
5. How is Sziget financed? (Any state-fund?)
6. How different cultures displayed in Sziget?
7. How can Hungarian culture be excelled in Sziget?
8. What role does Hungarian music play in Sziget?
9. How can build Sziget the Hungarian image?
10. Is there any connection to the government's actions regarding this aim?
11. In your opinion can Sziget change the associations toward Hungarian music and Hungarian music export?

Appendix 7. Interview Guideline for Jávör Delov (Turbo, Random Trip), Balázs Fehér (The Carbonfools), Gábor Lepés (Balkan Fanatik)

I used the same guideline as for Attila Bátorfy and Balázs Weyer, but I supplemented it with the following specific questions:

- What are the financial income sources for a musician nowadays?
- What does a relationship between brand and artist look like?
- How can brands and musicians build a partnership? Is it a long-term goal?

Appendix 8. Interview Guideline for Gábor Újfalusi

For Gábor Újfalusi I used the same guideline as for Attila Bátorfy and Balázs Weyer, but I supplemented it with the following specific questions:

- What kind of governmental supporting institutions and financial elements are available in Hungary?
- How could government take an initiative in boosting Hungarian musical image?
- What role should government take in cultural diplomacy?

Appendix 9: Questionnaire Design

Q1. What does music mean to you? (You can choose more than one answer.)

- ☐ relaxation
- ☐ entertainment
- ☐ party
- ☐ emotions
- ☐ hobby
- ☐ communication
- ☐ mood
- ☐ other

Q2. How much time do you listen to music per a day?

- ☐ less than 1 hour
- ☐ 1 hour
- ☐ 2-3 hours
- ☐ 3-5 hours
- ☐ more than 5 hours

Q3. What kind of music do you listen to? (You can choose more than one answer.)

- ☐ pop
- ☐ rock
- ☐ jazz
- ☐ punk
- ☐ electronic
- ☐ classic
- ☐ soul
- ☐ hip-hop
- ☐ dance
- ☐ latin
- ☐ other

Q4. What is the country of origin of the music you listen to usually? (You can choose more than one answer.)

- ☐ UK
- ☐ US
- ☐ Hungary
- ☐ France
- ☐ Germany
- ☐ Spain
- ☐ Italy
- ☐ Sweden
- ☐ Other

>>

Cee Lo Green
David Guetta
Natasha Bedingfield
José Gonzales
Jay-Z
deadmau5
OK
Lady Gaga
U2
Madonna

Coca-Cola

Sony Bravia

Absolut Vodka

Google Chrome

Blackberry

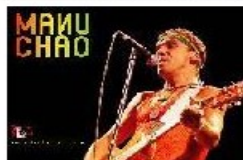
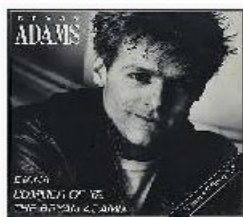
Q8.

Please, connect the given pictures to the country of their origin! (Click on the picture and drag your mouse to the country) You can choose in this section from UK, US, Sweden, Russia, Italy and Finland.

Items	UK
	
	
	
	
	
	
	US
	Sweden
	Russia
	Italy
	Finland

Q9. Please, connect the given pictures to the country of their origin! (Click on the picture and drag your mouse to the group) You can chose in this section from Canada, Australia, Colombia, Germany, France, Spain.

Items



Canada

Australia

Colombia

Germany

France

Spain

>>

Q10. Which of the following European music festivals have you heard about?

- ☐ Sziget (Hungary)
- ☐ Melt! (Germany)
- ☐ Exit (Serbia)
- ☐ Pinkpop (Netherlands)
- ☐ Glastonbury (UK)
- ☐ Tomorrowland (Belgium)
- ☐ Rock am Ring (Germany)
- ☐ Open'er Festival (Poland)
- ☐ Pohoda Festival (Slovakia)
- ☐ Rock for People (Czech Republic)

Q14. What was the reason you visited those festivals? (You can choose more than one answer.)

- ☐ reputation of the festival
- ☐ advertising
- ☐ friends suggested to me
- ☐ the country itself
- ☐ people
- ☐ musicians
- ☐ party
- ☐ other cultural programmes
- ☐ other

Q11. Have you attended a music festival already in your

- ☐ Yes
- ☐ No

Q12. How often do you go to music festivals?

- ☐ Never
- ☐ Less than Once a Year
- ☐ Once a Year
- ☐ 2-3 Times a Year
- ☐ More than 3 Times a Year

Q13. Which of the following European festivals have you visited? (You can choose more than one answer.)

- ☐ Sziget (Hungary)
- ☐ Melt! (Germany)
- ☐ Exit! (Serbia)
- ☐ Pinkpop (Netherlands)
- ☐ Glastonbury (UK)
- ☐ Tomorrowland (Belgium)
- ☐ Rock am Ring (Germany)
- ☐ Open'er Festival (Poland)
- ☐ Pohoda Festival (Slovakia)
- ☐ Rock for People (Czech Republic)
- ☐ None of them
- ☐ Other

Q16. Please, evaluate the following statements.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
I do not like musical events	☐	☐	☐	☐	☐
I do not belong to a music subculture	☐	☐	☐	☐	☐
I often go to concerts	☐	☐	☐	☐	☐
Music plays an important role in my life	☐	☐	☐	☐	☐
I usually remember on songs played in commercials	☐	☐	☐	☐	☐
Music is more important for me than movies.	☐	☐	☐	☐	☐
I could not imagine my life without music	☐	☐	☐	☐	☐
Musical events are good touristic attractions	☐	☐	☐	☐	☐
Government should support musical events	☐	☐	☐	☐	☐
People should study music	☐	☐	☐	☐	☐
Music influences the picture of a country I have in mind	☐	☐	☐	☐	☐

Q17. Have you been to Hungary already?

- ☐ Yes
☐ No

Q18. What do you think about Hungarian music? Please, complement the following sentence. Hungarian music is ...

Q19. What do you think about Hungarian music?

unique	☐	☐	☐	☐	☐	☐	☐	common
famous	☐	☐	☐	☐	☐	☐	☐	unknown
exotic	☐	☐	☐	☐	☐	☐	☐	usual
favourite	☐	☐	☐	☐	☐	☐	☐	not my favourite
classical music	☐	☐	☐	☐	☐	☐	☐	gypsy music
modern	☐	☐	☐	☐	☐	☐	☐	traditional
global	☐	☐	☐	☐	☐	☐	☐	local
passionate	☐	☐	☐	☐	☐	☐	☐	boring
competitive	☐	☐	☐	☐	☐	☐	☐	non-competitive

>>

Age. What year were you born?

GEN. What is your gender?

- ☐ Male
☐ Female

Edu. What is the highest level of education you have completed?

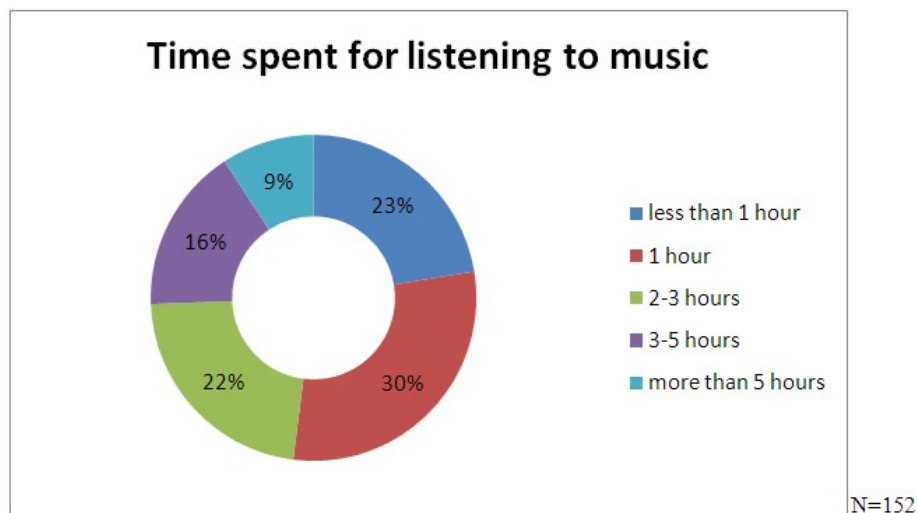
- ☐ Less than High School
☐ High School
☐ College
☐ Bachelors Degree
☐ Masters Degree
☐ Doctoral Degree

OCC. Please indicate your occupation:

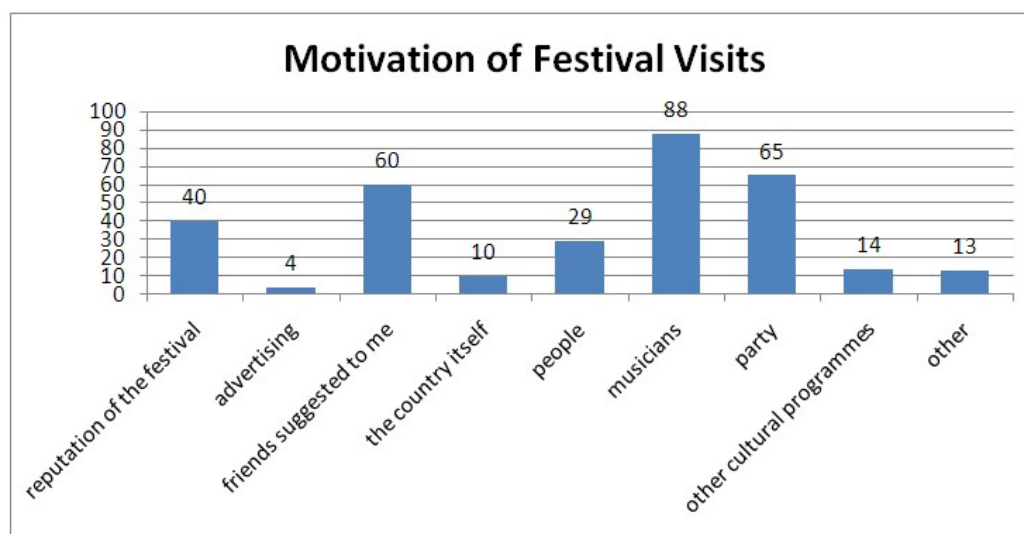
COU. In which country do you reside?

>>

Appendix 10. Time Spent for Listening to Music



Appendix 11. Motivation of Festival Visits



Appendix 12. Evaluation of Statements

Scale	Mean	Median	Modus
unique-common	3,56	4	4
famous-unknown	5,35	6	6
exotic-usual	4,18	4	4
favourite-not my favourite	4,32	4	4
classical music-gypsy music	3,86	4	4
modern-traditional	4,13	4	4
global-local	4,97	5	6
passionate-boring	3,61	4	4
competitive-non-competitive	4,56	4	4

Appendix 13. Correlations of Questionnaire

According to Gender		
	ANOVA significance	Levene significance
Music influences the picture of a country I have in mind	,046	,101
Hungarian music is famous - unknown	,017	,137
According to visiting Hungary		
	ANOVA significance	Levene significance
I do not like musical events	,046	,816
I usually remember on songs played in commercials	,037	,303
Hungarian music is classical music:gypsy music	,049	,765

According to music festival attendance		
	ANOVA significance	Levene significance
I do not like musical events	,000	,987
I do not belong to a music subculture	,009	,198
I often go to concerts	,011	,310
Government should support musical events	,047	,077
People should study music	,006	,918
Hungarian music is my favourite: not my favourite	,048	,465
According to frequency of music festival visiting		
	ANOVA significance	Levene significance
I do not belong to a music subculture	,001	,990
I often go to concerts	,000	,439
Music plays an important role in my life	,006	,072
Music is more important for me than movies.	,025	,513
I could not imagine my life without music	,008	,349
Musical events are good touristic attractions	,000	,963
Government should support musical events	,002	,273
People should study music	,021	,456
Music influences the picture of a country I have in mind	,012	,459
Hungarian music is famous: unknown.	,028	,066
According to country of origin (Hungarian; foreign)		
	ANOVA significance	Levene significance
Musical events are good touristic attractions	,001	,648
Government should support musical events	,011	,950
People should study music	,004	,742
Hungarian music is exotic: usual	,006	,670
Hungarian music is classical: gypsy.	,003	,430
Hungarian music is modern: traditional.	,010	,077
According to music consumption behaviour (Neutral vs dedicated)		
	ANOVA significance	Levene significance
I do not like musical events	,017	,183
I do not belong to a music subculture	,000	,068
I often go to concerts	,002	,063
Music plays an important role in my life	,000	,067
Music is more important for me than movies.	,000	,986
I could not imagine my life without music	,000	,099
Music influences the picture of a country I have in mind	,016	,367