



HKADC Behavioural Study on Arts Participants

Final Report for Stage 3 – Survey on the
patterns of arts participation

NielsenIQ Hong Kong

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Research overview

Research background and overview

- As a statutory body to establish Hong Kong as a dynamic and diverse cultural metropolis, the Hong Kong Arts Development Council (“HKADC”) strives to support and promote the development of major art forms in Hong Kong, including Dance, Theatre, Music, *Xiqu*, Multi-arts, Visual Arts, Film Arts, and Literary Arts. As such, in 2015, HKADC conducted the Arts Participation and Consumption Survey to identify and profile arts participation as well as to develop indicators for understanding arts development in Hong Kong.
- HKADC recognises the emerging development of “arts-tech” and alternative modes of arts programmes in the arts sector. Hence, HKADC is currently conducting a **Behavioural Study on Arts Participants** (“Study”) to track the trends in local arts participation and examine the behavioural patterns of existing and potential arts participants.

- The results of this study will **facilitate the formulation of more targeted strategies for enhancing and expanding arts participation** in Hong Kong.

There are 3 stages of the Study:

Stage	Overview	Fieldwork Period
1	Survey on alternative modes of arts participation by the local population	Jan, 2021
2	Focus groups on the behavioural patterns of local arts participants	Jul – Sep, 2022
3	Survey on the patterns of arts participation by the local population	Aug – Sep, 2022

- HKADC has commissioned NielsenIQ for **Stage 3 survey** (“2022 Survey”).

Survey objectives

- Specifically, the Stage 3 survey (“2022 Survey”) served to achieve the following objectives:

▶▶▶ Arts attendance



1. Track the attendance rates, the average number of free vs paid admissions and expenses of physical and online modes of each art form and genre from Jul'21 to Jul'22



2. Analyse the average annual budget of ticketed cultural activities by different demographic segments

▶▶▶ New technology in arts programmes



3. Assess the awareness level of new technology used in arts programmes and incidence of attending any of these



4. Understand the audience's attitudes towards the use of new technology in arts programmes

Scope of art forms and sub-categories

- Stage 3 Survey covered participation in programmes / exhibitions of eight core art forms.
- Sub-categories of each art form that were shown to respondents are listed below:

Art form	Sub-categories
Dance	Ballet, Modern / Contemporary Dance, Chinese Dance / Choreodrama, Street Dance / Hip Hop Dance / Jazz Dance, and mixed genres and others (including Foreign Folk Dance)
Theatre	Drama, Musical, Mime / Physical Theatre / Puppetry, and mixed genres and others (including Environmental Theatre)
Music	Chinese Instrumental Music, Western Instrumental Music, Choir, Opera / Vocal Music, Jazz Music, and mixed genres and others (including New Media/Electronic Music)
Xiqu	Cantonese Opera, Cantonese Operatic Song, other <i>Xiqu</i> genres (including Jingkun / Nanyin), and mixed genres and others
Multi-arts	Any arts activities that integrate two or more art forms, e.g. a Drama performance with Electronic Music and Video Projection, or programmes with elements of Magic Performance, Juggling/Circus, Sand Painting, Video Projection, Figure Skating, etc.
Visual Arts	Exhibitions of Painting, Calligraphy and Seal Carving, Photography, Prints, New Media Art, Mixed Media and Installation, Ceramics, Sculpture, Antiquities, Mixed Art-forms / Other Visual Arts exhibitions (including Children Art, Design, Performance Art)
Film Arts	Film Festival Screenings, Other Thematic Screenings, Other Documentary Films, Independent Short Films or Independent Films, etc.
Literary Arts	<ul style="list-style-type: none">• Literary Reading: Novel / Biography, Prose / Literary Review, Poem / Verse / Chinese classics, Children's and Juvenile Literature (including picture books)• Literary Activities: Literary lectures, Book clubs / Poetry clubs, Literary Workshops / Creative Writing Workshops, Literary New Book launches, and Book Fairs

Notes to readers

- In general, arts participants refer to those who participate in either physical modes (*in-person admission, purchase physical literature, read physical literature at home, borrow physical literature in person*) or alternative modes (*TV/radio broadcasting, paid TV channels/streaming services, sharing platforms, online meeting applications, specific websites, DVD/CD, read e-books, other online channels*) of arts activities.
- For simplicity, “2018-2019” denotes the 2 years before the outbreak of COVID-19 and “2020” denotes the period during COVID-19 from Jan 2020 to Jan 2021 (the timeframe of arts participation covered in the stage 1 study).
- Expenditure on arts participation through alternative modes was only tracked in the Stage 3 study, and as a result, comparisons versus previous waves are not available.
- Reported results were weighted to ensure the sample is representative of the Hong Kong population.
- Due to rounding, the percentages might not add up to total.
- The 3,016 respondents in the 2015 study were Hong Kong residents aged 15-74, and the 1,500 respondents in the 2020 study were Hong Kong residents aged 16-64.



Notes to readers

- When comparing figures between different waves of study on Visual Arts, please note that New Media Art was included in the stage 3 questionnaire as one of the mediums of artworks under Visual Arts to reflect its increasing popularity, while the medium was not specifically mentioned in the questionnaires of the 2015 study and stage 1 study.
- When comparing figures between different waves of study on Film Arts, please note that the 2015 Study and Stage 1 Study surveyed “Film and Media Arts”, whereas the Stage 3 Study covered “Film Arts” only. However, the incidence difference observed between “Film and Media Arts” and “Film Arts” in the 2015 Study was insignificant.
- Since the 2015 study was on physical arts participation only, only incidence in physical modes were counted in the stage 3 study whenever comparisons are made between the two studies. In the 2015 study, Literary Reading and Literary Activities were grouped together as Literary Arts. However, in the 2015 study, book fairs were not included as Literary Activities, and Literary Reading only covered literary books read in libraries, book stores and cafes. In the stage 3 study, the scope of both Literary Activities and Literary Reading expanded. While Literary Activities included also book fair, Literary Reading covered literary books read anywhere.



Target respondents

Hong Kong residents aged 15-74 (excluding foreign domestic helpers)

The sample was then projected to the Hong Kong population (aged 15-74) of 5,907,200[^].



Methodology

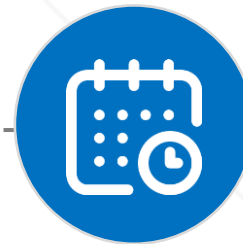
Hybrid methodology was employed:

- 1) Online Survey – NielsenIQ's Panel
A representative sample was drawn and all sampled respondents were invited to participate in the survey.
- 2) Offline recruitment & street intercept
Interviewers were sent to 18 districts to recruit target respondents to self-complete the survey with assistance from interviewers.



Sample Size

n=3,017
Online: n=2,002
Offline: n=1,015



Survey Period

11 August 2022 –
8 September 2022

- *Soft quota on **age, gender and living districts** were imposed.*
- *To ensure that the sample was representative of the Hong Kong population, weighting was applied to the sample to reflect the distribution of age, gender and living districts of the Hong Kong population according to the “Hong Kong Annual Digest of Statistics 2021”[#].*

[^]Published by the Hong Kong Census and Statistics Department, available at https://www.censtatd.gov.hk/tc/web_table.html?id=1A

[#]Published by the Hong Kong Census and Statistics Department, available at https://www.censtatd.gov.hk/en/data/stat_report/product/B1010003/att/B10100032021AN21B10100.pdf

Definitions of terms/ symbols

Life segments

Students	Any students
Working singles	All working individuals that are single/ unmarried
Married/co-habited persons w/o children	All married/ co-habited individuals that have no children
Parents with children aged 0-4	Any individual that has children and their <u>youngest</u> child is aged 0-4
Parents with children aged 5-14	Any individual that has children and their <u>youngest</u> child is aged 5-14
Parents with children aged 15+	Any individual that has children and their <u>youngest</u> child is aged 15+
Retirees/ aged 65+	All individuals aged 65+/ any retirees aged 64 or below that are not parents nor married persons without children.

(All unemployed individuals/ housewives aged below 65 who are neither married nor parents are not included in the life segments)



Notation

denotes small base ($n < 30$)

denotes very small base ($n < 10$)

- denotes a figure of 0%

* denotes a figure that is larger than 0% but less than 0.5%

  green/ red boxes highlight figures that were notably different from other subgroups'/ other categories' results

 black dotted boxes highlight figures that were notably different from past waves' results

Number of collected responses – by methodology

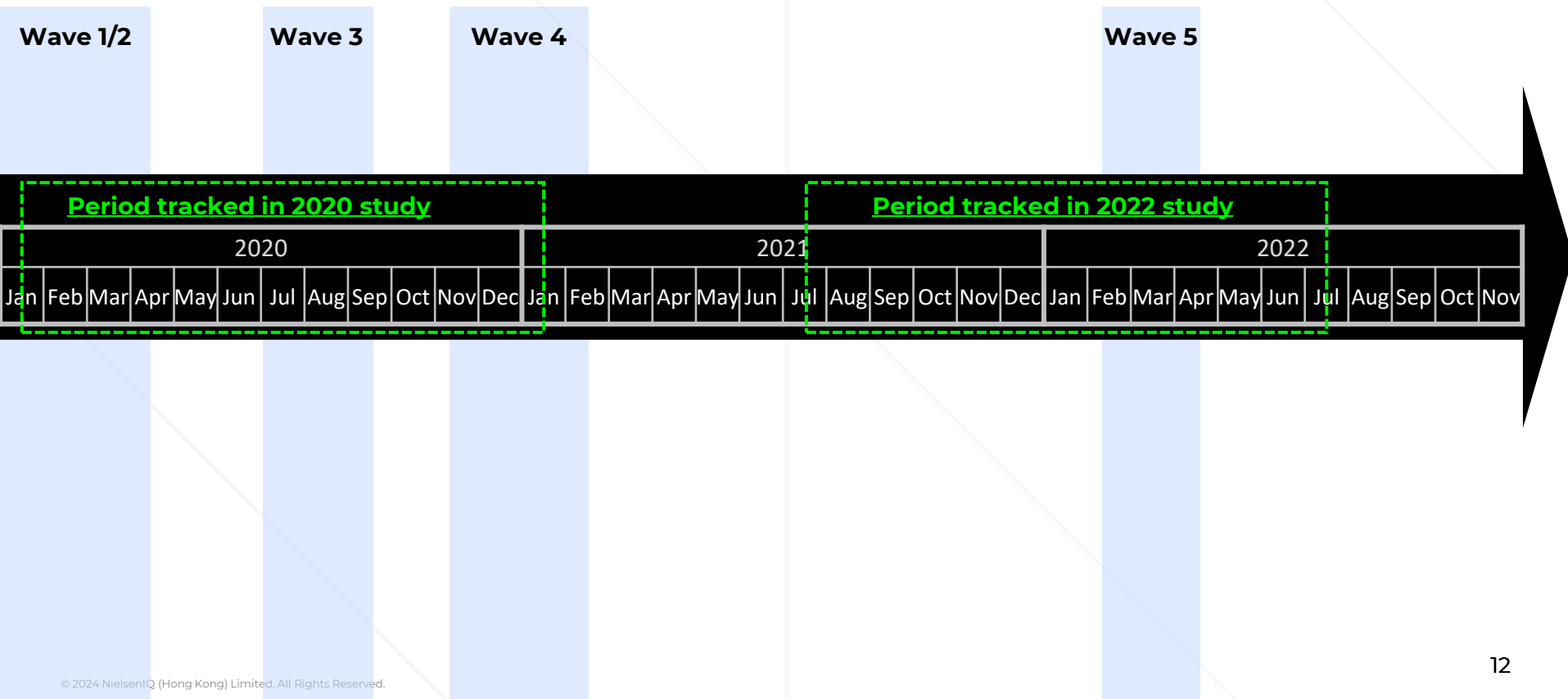
- Total number of respondents by methodologies were achieved as below:

	Overall			Online			Offline		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
15 – 24	182	181	363	144	143	287	38	38	76
25 – 34	250	298	548	198	236	434	52	62	114
35 – 44	265	408	673	209	324	533	56	84	140
45 – 54	271	396	667	215	313	528	56	83	139
55 – 64	229	240	469	80	80	160	149	160	309
65 – 74	158	139	297	30	30	60	128	109	237
Total	1,355	1,662	3,017	876	1,126	2,002	479	536	1,015

	Overall	Online	Offline
HK	482	318	164
KL	892	595	297
NT	1,643	1,089	554
Total	3,017	2,002	1,015

Timeline of COVID-19 Pandemic

- Notably, both the 2020 and 2022 study periods were impacted by waves of COVID-19 and arts participation may have been restrained during these periods due to venue closure, anti-COVID-19 measures and fear of infection.



Key highlights on arts participation

Recovering arts participation

- From July 2021 to July 2022, slightly over three-quarters of respondents (78%) had participated in at least one art form by either physical or alternative modes, recovering from 2020 when the pandemic started (61%). The recovery was seen in both physical and alternative modes, especially in physical mode (+26%) (see slide 24).
- While the recovery from 2020 was partly due to the relaxed pandemic restrictions, an upward trend in arts participation (any mode) was observed when compared to the pre-pandemic level (74%) (see slide 26).

Literary Activities, Music and Visual Arts were generally more popular

- Regardless of physical or alternative modes, the public showed a wide interest and participated in various art forms. Nearly Half (49%) had participated in more than one art form (see slide 37). Literary Activities (including attending book fairs) (26%), Music (25%) and Visual Arts (25%) were slightly more common, closely followed by Film Arts (24%), Dance (22%), Theatre (22%) and Literary Reading (22%). Multi-arts, however, was less seen (6%) (see slide 26).
- In the context of physical-mode arts participation, Literary Reading (18%), Literary Activities and Visual Arts (15% respectively) stood out from various art forms (see slide 24). The situation for alternative modes was different, as various art forms shared similar participation incidences (15%-21%), except for Multi-arts (5%) (see slide 25).
- Over time, there was an increment of Dance and Visual Arts participation in both physical and alternative modes. A decline of participation in Film Arts in alternative modes, but an increase in physical mode is observed, bringing the participation rate of Film Arts (any mode) down to a similar level to the majority of other art forms other than Multi-arts and *Xiqu* (see slide 24-26).

The public embraced more physical art forms in the future

- Looking into the future, the public welcomed various art forms in the physical mode, particularly Film Arts (54%), Theatre (50%), Visual Arts (48%) and Dance (48%). Compared with the 2020 results, the public's interest had grown over time (+3%~+17%) (see slide 36).
- This was slightly different from the most commonly participated physical forms in 2021/22, in particular Literary Reading (18%) and Literary Activities (15%). This is an indication that the public looked for more art forms than they are doing in 2021/22 (see slide 36).

Key highlights on frequency and spending

Arts participants attended more than 1 activity per month on average

- In any mode, arts participants attended 13.8 activities in one year, slightly over 1 activity per month on average. *Xiqu* participants showed a greater tendency of repeated attendance, to 7.8 activities per year, more than that of other art-form participants (see slide 46).
- Physical activity participants attended 6.5 activities on average, with similar figures observed from various art forms (3.4~4.0), except for Literary Activities, which was comparatively lower (2.8). In recent years, repeated participation in Dance, Music, Theatre and Visual Arts activities has become more common, and the number of activities has increased over time (see slide 44).
- Alternative-mode activities were more frequently attended than physical ones, with 12.5 activities on average, potentially due to its greater flexibility of joining. In particular, the annual participation frequency of *Xiqu* participants is higher than that of other art form participants (7.2 v.s. 4.8-5.9) (see slide 45).

More paid activities in physical mode and more free activities participated in alternative modes

- Combining both physical and alternative modes, free activities (7.7) were slightly more attended than paid ones (6.2) per arts participant (see slide 46).
- The same trend was observed in alternative-mode activities, where free ones (7.5) outweighed paid ones (5.0). However, looking at physical activities, paid activities (3.6) were more common than free ones (2.9) (see slide 44 & 45).

Higher spending on Dance, Theatre, Music and *Xiqu*

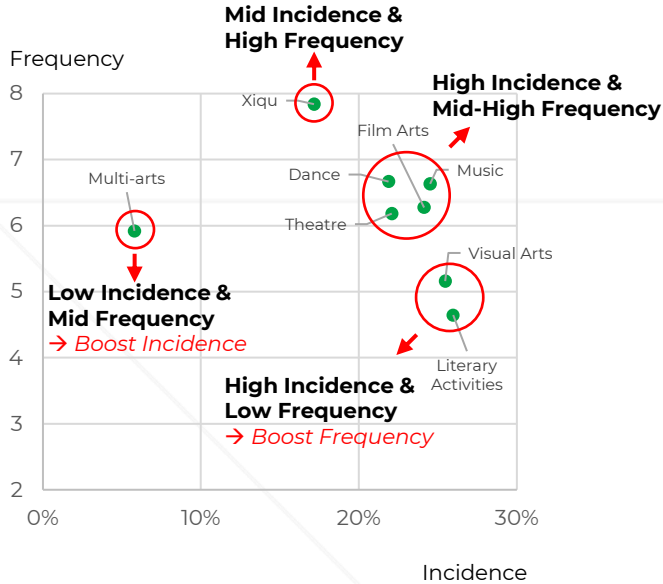
- The overall average annual spending on core art forms was \$1,381, with average annual spending in physical mode (\$948) slightly lower than that of alternative modes (\$1,029). Out of various art forms, Theatre (\$724), Music (\$688), Dance (\$666), and *Xiqu* (\$634) were associated with higher average annual spending (see slide 52).
- Theatre was the art form with the highest physical average annual spending (\$720) and the second highest future physical participation interest (50%), indicating a higher total expenditure in the future for it (see slide 36 & 52).



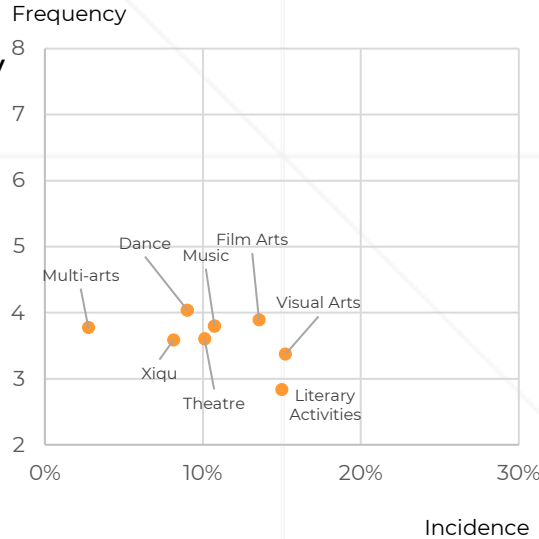
Summary of art forms by incidence & frequency

A cross-analysis between the incidence and frequency of major art forms is done to identify the similarity of different art forms.

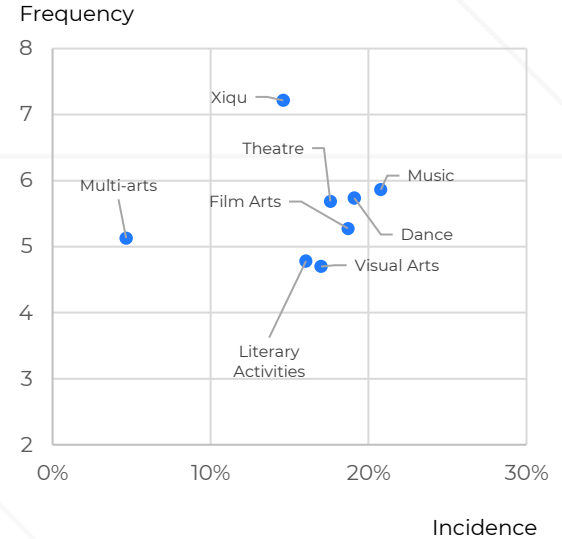
Any Mode



Physical Mode



Alternative modes



Key highlights by projected annual attendance and expenditure

Overall

- The projected annual attendance for any mode of arts activities from Jul'21 to Jul'22 was 60.1M (see slide 51). The total projected expenditure on ticketed arts and cultural activities was 8.4B in which spending on activities of core art forms (5.1B) accounted for 61% of the market share (see slide 59).
- Possibly due to COVID-19, which had a large influence on arts participation in 2021/22, as many performing venues were closed and people were advised to stay at home, a substantial amount of overall participation came from activities through alternative modes, resulting in a relatively higher projected annual attendance and expenditure through alternative modes (see slide 51 & 54).
- Those who participated in arts events through alternative modes could be seen as potential audiences in physical performing venues.

By mode of attendance and art form

- For physical mode, Film Arts had the highest projected attendance in general, closely followed by Visual Arts, which had relatively higher projected attendance in free activities than paid activities as compared to other art forms (see slide 47 & 49).
- For alternative modes, Music had the highest projected attendance, particularly on free activities. Dance had the 2nd largest projected attendance, whereas the attendance in paid activities was the highest across the board (see slide 50).

By life segment

- In physical mode, parents and Working Singles had the highest share of attendance and expenditure among all segments in all art forms (except *Xiqu*) (see slide 48 & 57). As compared to 2014/2015, parents' share of projected attendance in physical mode increased significantly and contributed to more than half of attendance and spending across all art forms (see slide 48 & 57). The projected annual attendance of Working Singles dropped in most art forms when compared to 2014/15; however, their share of attendance was still the second biggest across art forms except *Xiqu* (see slide 48).
- Students' share of attendance (physical mode) decreased across the board when compared to 2014/15, likely due to a reduction of school events during the pandemic and a demographic change (see slide 48).
- Combining both physical and alternative modes, Married / co-habited persons w/o children reported the highest share of expenditure on core art forms (see slide 60).

Key highlights on arts-tech



Arts-tech reached the majority of the market

- Exactly 4 fifths of the population, or 88% of existing arts participants, had already heard of arts-tech and 72% of existing arts participants had already come across it in their arts activities (see slide 63, 65).

Arts-tech improved the arts participation experience but not the most appealing selling point

- Most arts participants who had experience with arts-tech reported that arts-tech improved their experience. As a result, 74% of them stated that they would pay attention to whether or not arts-tech is incorporated in the future (see slide 72).
- Classic works, inspirational/ reflective topics and locally/ internationally renowned ranked substantially higher than arts-tech as attractive selling points for arts activities (see slide 80).



Arts-tech interest is primarily confined to existing arts participants

- However, those interested in arts-tech were primarily made up of existing arts-participants or were already intrigued by arts in the first place, regardless of whether or not arts tech was incorporated. As a result, only less than 3% would be driven to participate in arts activities solely because of arts-tech (see slide 79).

The next steps forward...

- Continue to incorporate arts-tech elements to improve existing arts participants' experience and encourage repeated visits.
 - Specifically, Live streaming and Image projection elements were favoured in Dance activities, whereas Image projection was also enjoyed in Theatre performances (see slide 65).
- Promotional videos would be essential to help existing and potential arts participants understand how arts events are combined with arts-tech (slide 72).

Key highlights by life segment (1)

Students – less active in physical but more engaged with Dance and Visual Arts



- Students were less active in participating in physical events, unlike in 2014/2015, when they were more likely to attend activities in various art forms (except *Xiqu*) in person than other segments. Still, they were more likely to engage in Dance activities in physical mode (16%) than other life segments (4%-13%) in 2021/22 (see slide 28).
- Looking at the incidence of any mode, their overall incidence (68%) is lower than the average level (78%) (see slide 34). When compared with 2020, Students saw a major improvement in Visual Arts (+23%), followed by Dance (+19%), and when compared with 2018-19 (pre-pandemic years), both Visual Arts and Dance increased by +18% (see slide 34).
- Students had a high total awareness level of arts-tech (92%) (see slide 62). They also had a higher agreement on the attitudes towards arts-tech than most of the other segments, including paying attention to arts-tech elements (63%), enhancement by arts-tech (62%), and promotional videos of arts-tech (66%) (see slide 73).

Working Singles – similar incidence with overall and before, and relatively higher with Visual Arts



- Visual Arts was the most common art form for Working Singles in physical mode (20%), of which the participation level was one of the highest among various segments (only behind Parents with children aged 0-4) (see slide 28 & 29).
- In terms of participation in any mode, Working Singles had similar participation incidence with the overall level (73% and 78% respectively in 2021/22). This pattern was consistent with the situation in 2020 (61% overall and 59% for Working Singles) (see slide 34).
- Working Singles' total awareness level of arts-tech (85%) was higher than the overall level (80%), and the same goes for unaided awareness of individual arts-tech too (except Sound Art)(see slide 63).
- Yet, their experience level of various arts-tech (61%) was similar to the overall level (see slide 66).
- They also considered that Live Streaming (71%) had improved their experience out of various arts-tech (see slide 70).

Key highlights by life segment (2)

Married/ co-habited w/o children – highest physical-mode incidence



- Married/ co-habited w/o children's physical incidence was highest on an overall level, and also for Theatre (18%) and Music (14%) events. Compared with 2014/2015, their participation in these two art forms grew from one of the lowest (4% and 6%) to the highest among segments, driven by the highest improvements across life segments (see slide 28).
- Compared to 2020, the segment's arts participation in any mode increased the most (+26%) across segments, to a participation level of 76% in 2021/22. In particular, their engagement in Literary Reading (32%) and Theatre (31%) is more than other segments (see slide 34).
- While their awareness level of arts tech (82%) was similar to the overall level (80%) (see slide 62), they were less likely to have experienced it (52%) than other segments except for Retirees (see slide 66).
- Nevertheless, those who had experienced arts-tech had a higher agreement on the improvement brought by Image Projection (75%), Non-Fungible Token (70%), Sound Art (76%) and Motion Capture (70%) than other segments, showing their high interest and expectation towards arts-tech (see slide 70).

Parents with children aged 0-4 – highest alternative-mode incidence and 2nd highest incidence of any mode



- In alternative modes, Parents with children aged 0-4 were the most active participants in Dance, Music, Multi-Arts and Film Arts, contributing to the segment's second highest incidence in the same art forms across segments in any mode. This was similar to the situation in 2020, when the segment had the highest incidence in both alternative and any mode.
- As for physical mode, although the segment's general arts participation is only similar to the overall level, the segment was the most active in engaging in Visual Arts exhibitions and Film Arts activities.
- Parents with children aged 0-4 also have a higher total awareness level of arts-tech (85%) than the overall level. Their awareness level of Sound Art (52%), Virtual Reality (55%) and Motion Capture (50%) is also higher than most of the other segments (see slide 63). Along with their higher awareness of arts-tech, their experience level of arts-tech was also the highest (83%) among various segments (see slide 67). They were also more likely to acknowledge the positive impact of Live Streaming (71%) (see slide 70).

Key highlights by life segment (3)

Parents with children aged 5-14 – highest incidence of any mode



- When looking at the incidence of any mode, this segment had the highest engagement across various segments (90%), in particular, Literary Activities (34%), Visual Arts (34%) and Dance (32%) (see slide 35).
- Parents with children aged 5-14 had a higher engagement with physical events than the overall level (57% vs 54%). Compared with the situation in 2014/15, this segment was more often participating in physical activities such as Dance (+9%), Visual Arts (+8%) and Film Arts (+8%) (see slide 29).
- Parents with children aged 5-14 was one of the segments with the highest awareness level of arts-tech (89%) and was only behind Students. Their awareness level of most arts-techs was also highest among various segments (see slide 63).
- Along with the high awareness level, their experience level of arts-tech was also higher (75%) and only behind Parents with children aged 0-4 (see slide 67).

Parents with children aged 15+ – highest projected expenditure under physical mode



- Looking at the projected expenditure under physical mode, parents with children aged 15+ had the largest share among all segments, consistently seen across art forms (see slide 55).
- The participation rate of Parents with children aged 15+ in various art forms is similar to the overall level, for both physical and alternative modes. Compared with the level in 2014/2015, their physical mode participation was generally higher than before, except for *Xiqu*, where a decline was seen (see slides 29).
- The awareness level (79%) and experience level (56%) of arts-tech among this segment were also similar to the overall level despite being among the lowest across segments (see slides 63, 67).
- Evaluating the impact of various arts-tech on their arts experience, Motion Capture and Virtual Avatars were enjoyed more by this group of parents than younger parents (see slide 70).

Key highlights by life segment (4)



Retirees/ aged 65+ - lowest incidence in various art forms except *Xiqu*, which was the highest

- Retirees/ aged 65+ saw the lowest incidence of both physical-mode and alternative-mode arts participation in general. The exception was *Xiqu*, where the Retirees had the highest incidence out of various segments for both physical mode (18%) and any mode (24%). Still, compared with 2014/2015, their participation in physical *Xiqu* events was less common than before (23%) (see slide 29, 35).
- The awareness (55%) and experience (30%) level of various arts-tech of Retirees/ aged 65+ were also lowest among various segments (see slides 63, 67). This resonated with their lowest attention to arts-tech elements in the arts activities (29%) (see slide 73).

Arts participation in Hong Kong

78% arts participation

Slightly over 3 quarters (77.5%), or a projected population of 4.58 million aged 15-74 participated in at least one art form by either physical or alternative modes during Jul'21-Jul'22, with a substantially higher attendance rate compared to 2020 (+17.0%).

54% in physical modes

54.3% or a projected population of 3.2 million aged 15-74 participated in at least one art form in person, which represented a major rebound in attendance rate compared to 2020 (+26.1%) and 2014/15 (+10.4%).

61% in alternative modes

61.2% or a projected population of 3.61 million aged 15-74 reported alternative modes of participation in at least one art form.



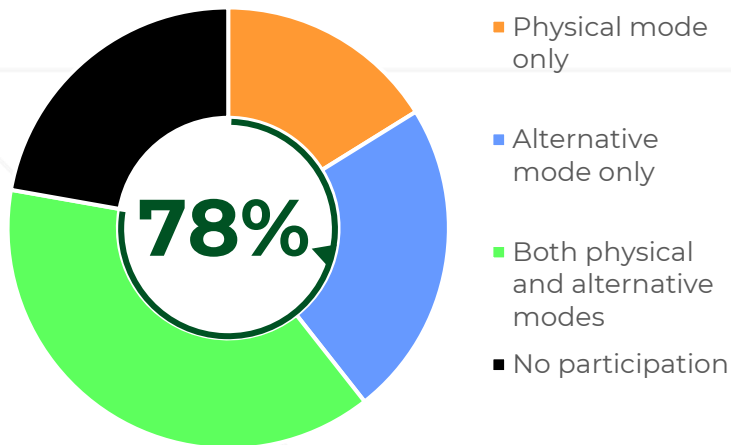
Incidence and projected population of arts participation – by participation mode

- Arts participation rebounded over the past year as slightly over 3 quarters participated in at least one art form by either physical or alternative modes. This was primarily driven by a jump in participation through physical mode (from 28.2% to 54.3%), likely attributed to the relaxed COVID-19 restrictions.
- As a whole, participation in arts appeared to be on the rise, surpassing levels observed in 2014/15.

77.5% of respondents or a projected population of 4.58 million had participated in at least one art form from July 2021 to July 2022.

▶ **77.5% (4.58 million)**

Any mode of participation from July 2021 to July 2022
2020 stage 1: 60.6% (+17.0%)



▶ **54.3% (3.21 million)**

Physical modes of participation from July 2021 to July 2022
2020 stage 1: 28.2% (+26.1%)
2014/15: 43.9% (+10.4%)

▶ **61.2% (3.61 million)**

alternative modes of participation from July 2021 to July 2022
2020 stage 1: 55.9% (+5.3%)

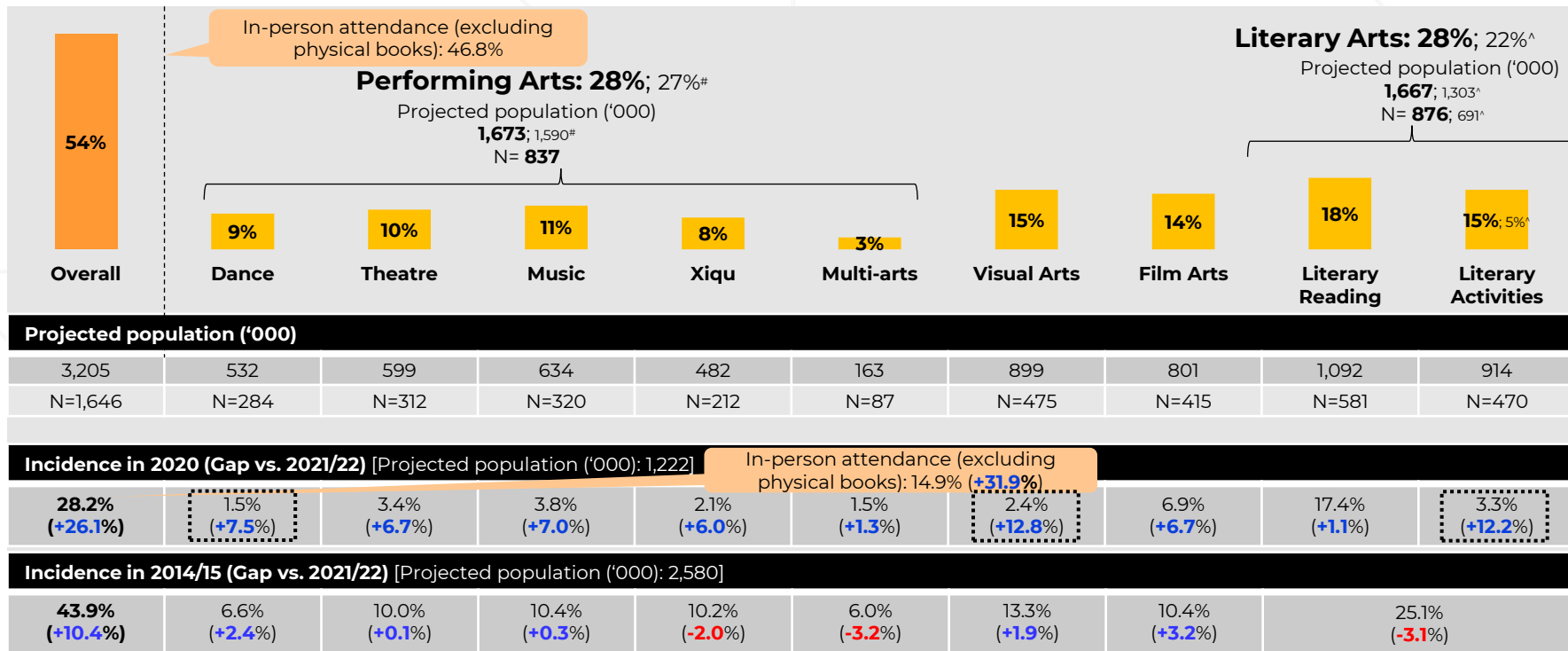
Source: Q101, Q102a, Q103a, Q104a, Q105a, Q106a, Q107a, Q108a, Q109a, Q110a

Base: All respondents (n=3,017)

Note: In the 2015 study, book fairs were not included as Literary Activities, and Literary Reading only covered books read in libraries, book stores and cafes. In the Stage 1 survey, respondents were HK residents aged 15-64.

Incidence of arts participation (physical mode) from Jul'21 to Jul'22 – by art form

- Excluding Literary Reading, in-person attendance of arts activities increased by 31.9%. It rebounded from 14.9% in 2020 to 46.8% in 2021/22, and the main drivers came from increased participation in Visual Arts, Literary Activities and Dance. Compared to 2014/15, Film Arts and Dance activities had relatively decent improvements.



Source: Q101, Q102a, Q103a, Q104a, Q105a, Q106a, Q107a, Q108a, Q109a, Q110a

Base: All respondents (n=3,017)

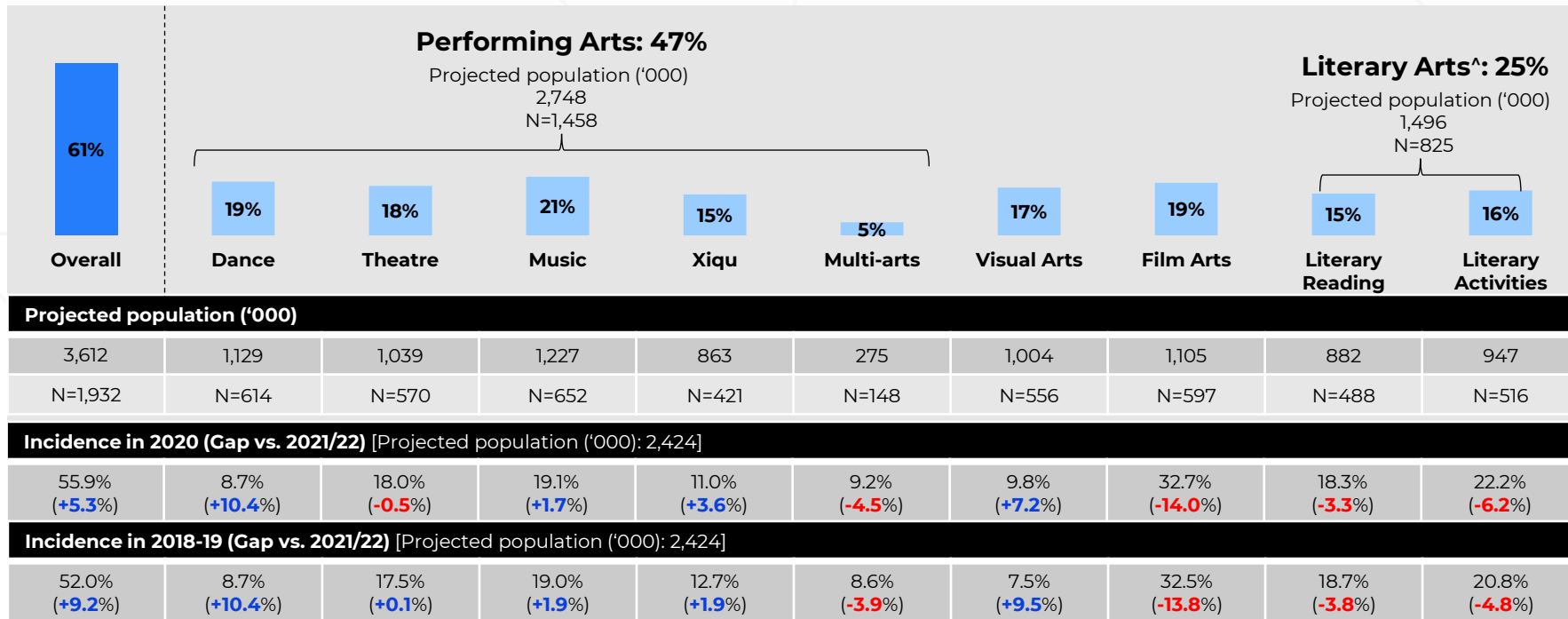
[^]Book fair is excluded for the purpose of comparing with the 2015 study.

Denotes figures from the 2015 study

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Incidence of arts participation (alternative modes) from Jul'21 to Jul'22 – by art form

- Interestingly, there was also a surge in participation in Dance and Visual Arts activities through alternative modes. However, as substantially fewer people viewed Film Arts activities, overall arts participation through alternative modes improved marginally.



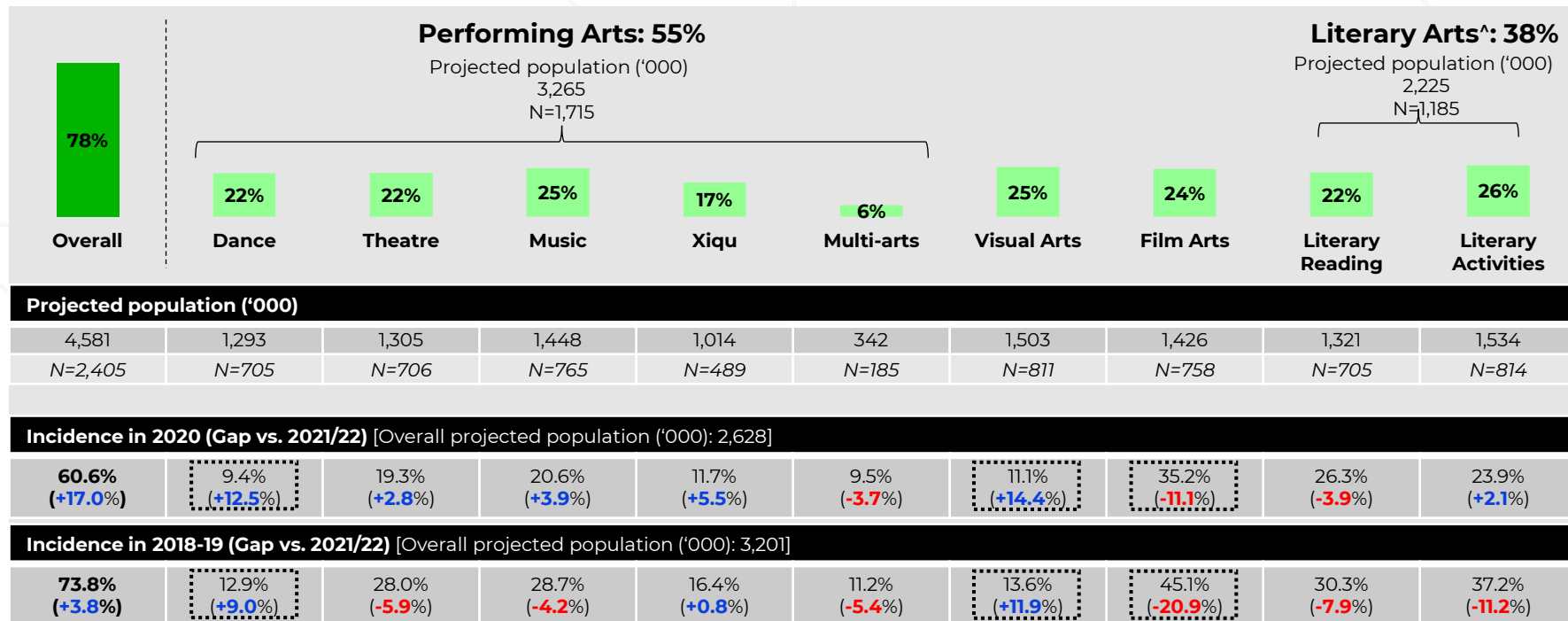
Source: Q101, Q102a, Q103a, Q104a, Q105a, Q106a, Q107a, Q108a, Q109a, Q110a

[^]Book fair is included.

Base: All respondents (n=3,017)

Incidence of arts participation (any mode) from Jul'21 to Jul'22 – by art form

- As such, Dance and Visual Arts activities were the key activities that drove increased participation in arts.
- On the other hand, participation in Film Arts dropped due to a substantial decrease in participation through alternative modes. This was likely because interest levels had dropped as the COVID-19 restrictions eased, and going to cinema and performing/ exhibition venues to watch films/ shows in person was preferred.



Source: Q101
 Base: All respondents (n=3,017)
[^]Book fair is included.

Arts participation deep dive



78%

Overall arts participation rate

Age group

25-34 age group had the highest participation (88%) while 65-74 age group had the lowest participation (62%)

Life segment

Parents with children aged 5-14 had the highest participation (90%) while Retirees had the lowest participation (58%)

Other driven segments

Participation was substantially higher among those with a monthly household income of \$30k or above (84% vs. 62% for MHI less than \$30k)

Comparison with previous waves

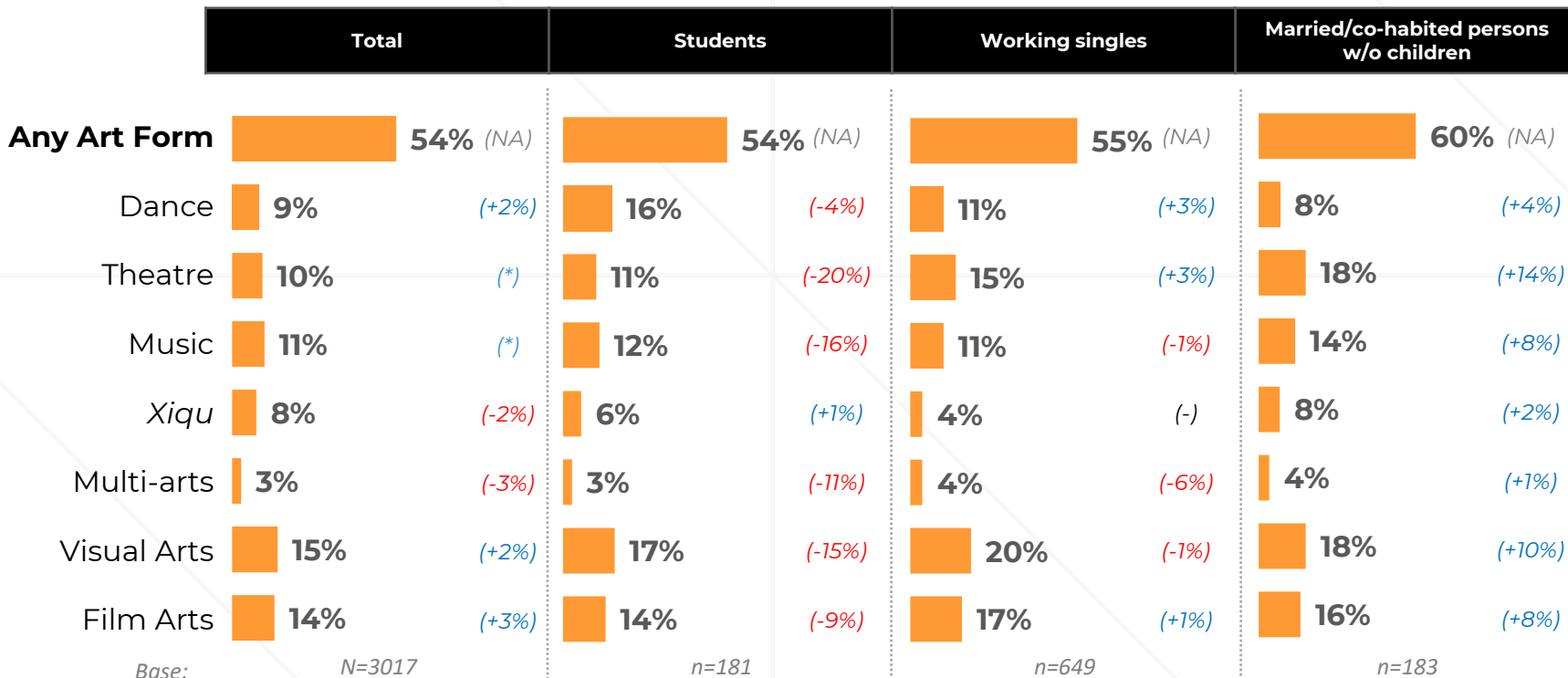
Compared to 2014/15, participation through physical modes rose among Married/co-habited persons without children, especially in Theatre (18% vs. 4% in 2014/15)[^]

Compared to 2020, participation through any mode rose the most among the 45-54 age group (85% vs. 53% in 2020)[@]

[^] Refer to slide 28 for detailed results
[@] Refer to slide 33 for detailed results
Remark: 2014/15's Literary Reading/ Activities results are not suitable for comparisons due to different question settings as explained on slide 8.

Incidence of arts participation (physical mode) from Jul'21 to Jul'22 – by life segment (1) – compared to 2014/15

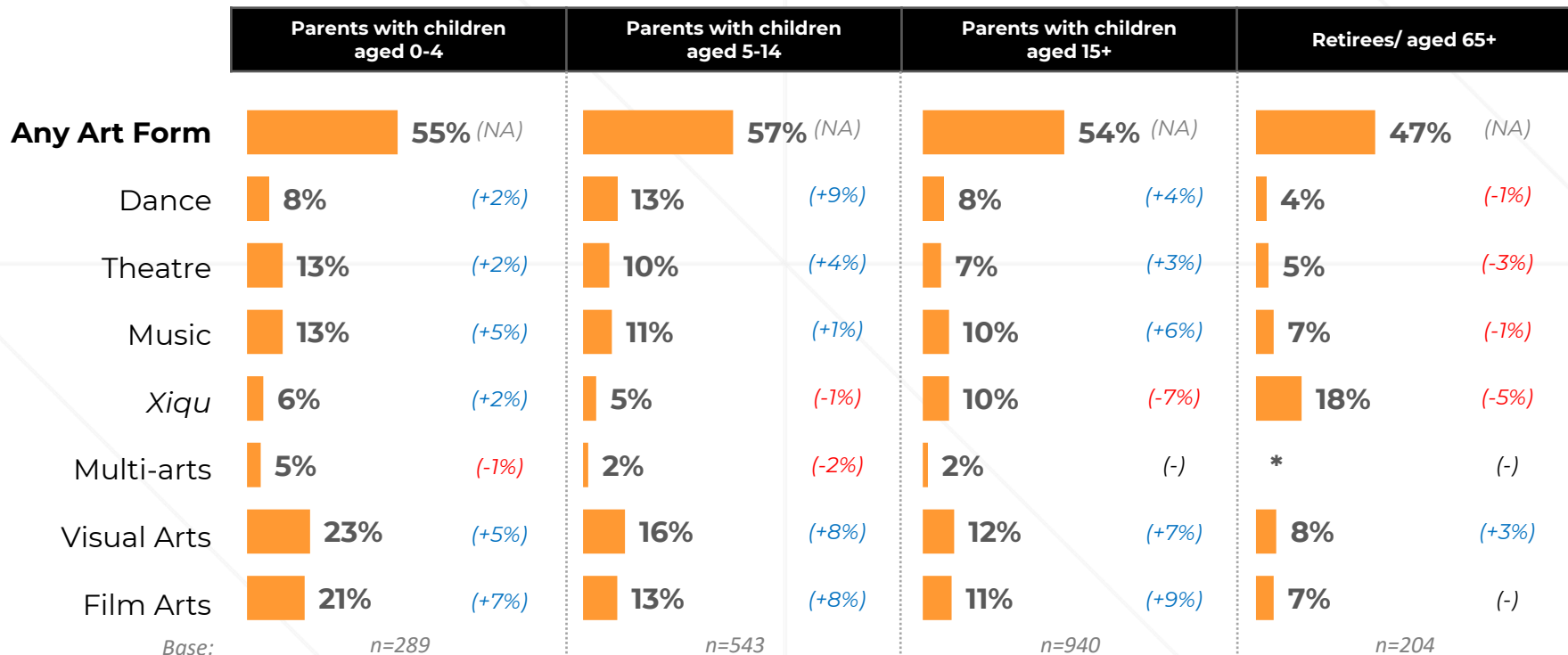
- Physical arts participation dropped significantly among Students in Theatre, Music and Visual Arts, while participation among those Married without children increased across art forms, particularly in Theatre and Visual Arts.



Source: Q101, Q102a, Q103a, Q104a, Q105a, Q106a, Q107a, Q108a, Q109a, Q110a
 () denotes gap vs. 2014/15's results NA – Not applicable due to unavailability of 2014/15 results
 Base: All respondents (n=3017)

Incidence of arts participation (physical mode) from Jul'21 to Jul'22 – by life segment (2) – compared to 2014/15

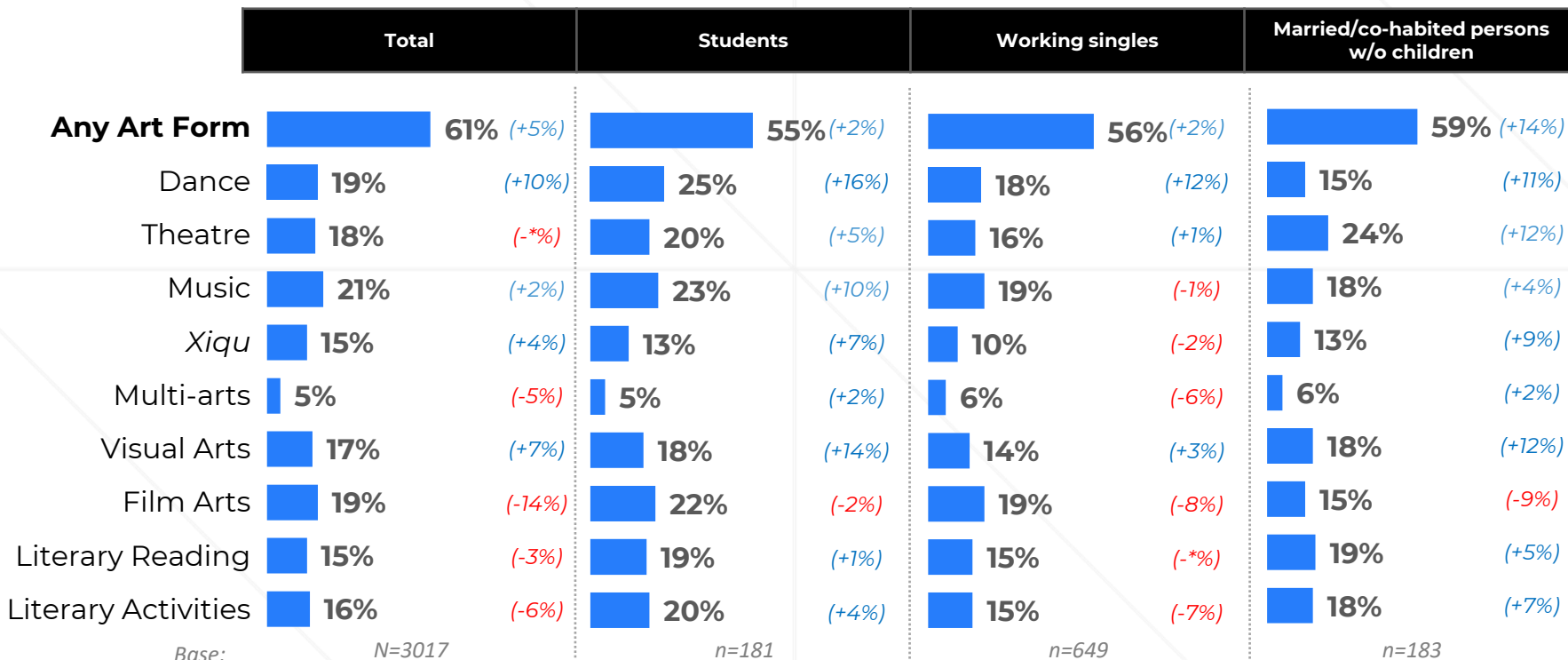
- Physical arts participation increased among Parents with children, particularly among those with children aged 15+ in Film Arts, Visual Arts and Music. On the other hand, participation among Retirees has dropped.



Source: Q101, Q102a, Q103a, Q104a, Q105a, Q106a, Q107a, Q108a, Q109a, Q110a
 () denotes gap vs. 2014/15's results NA – Not applicable due to unavailability of 2014/15 results
 Base: All respondents (n=3017)

Incidence of arts participation (alternative modes) from Jul'21 to Jul'22 – by life segment (1) – compared to 2020

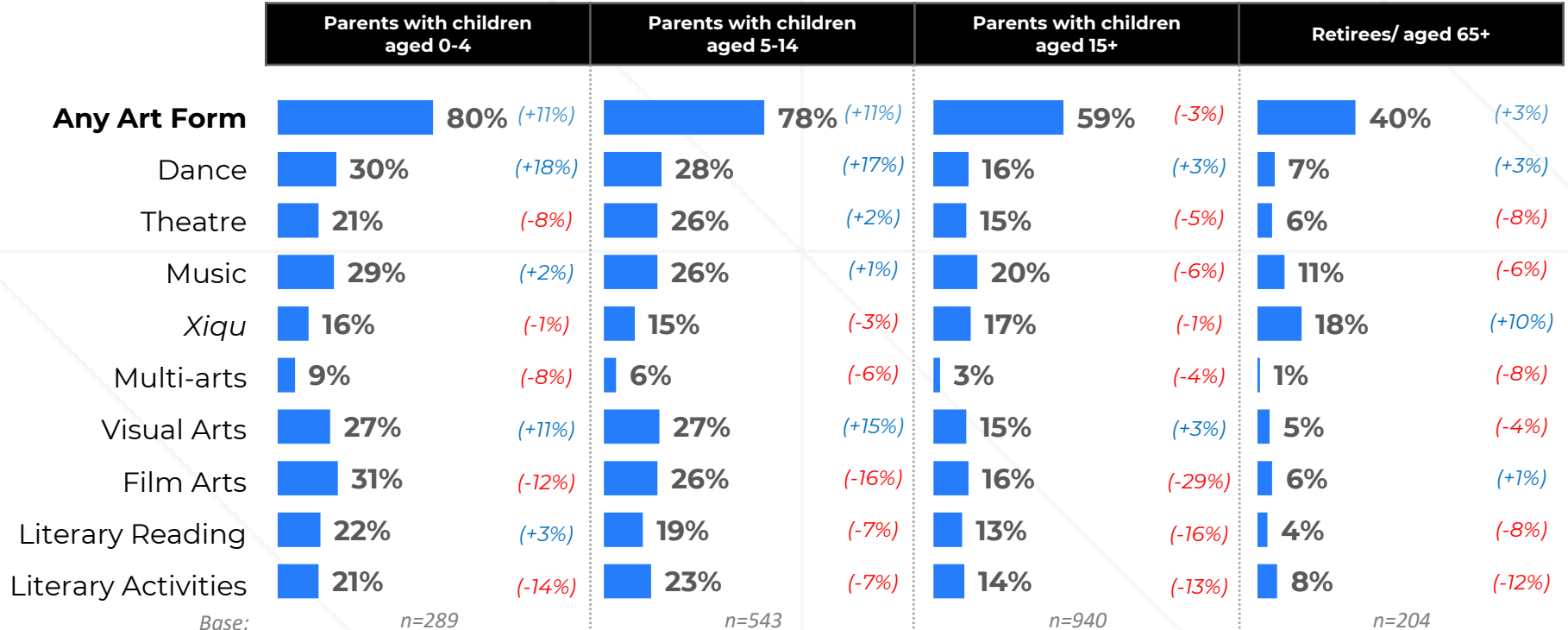
- Alternative-mode art participation increased significantly among Students in Dance, Music and Visual Arts, and among those Married without children in Dance, Theatre and Visual Arts.



Source: Q101, Q102a, Q103a, Q104a, Q105a, Q106a, Q107a, Q108a, Q109a, Q110a
 () denotes gap vs. 2020's results
 Base: All respondents (n=3017)

Incidence of arts participation (alternative modes) from Jul'21 to Jul'22 – by life segment (2) – compared to 2020

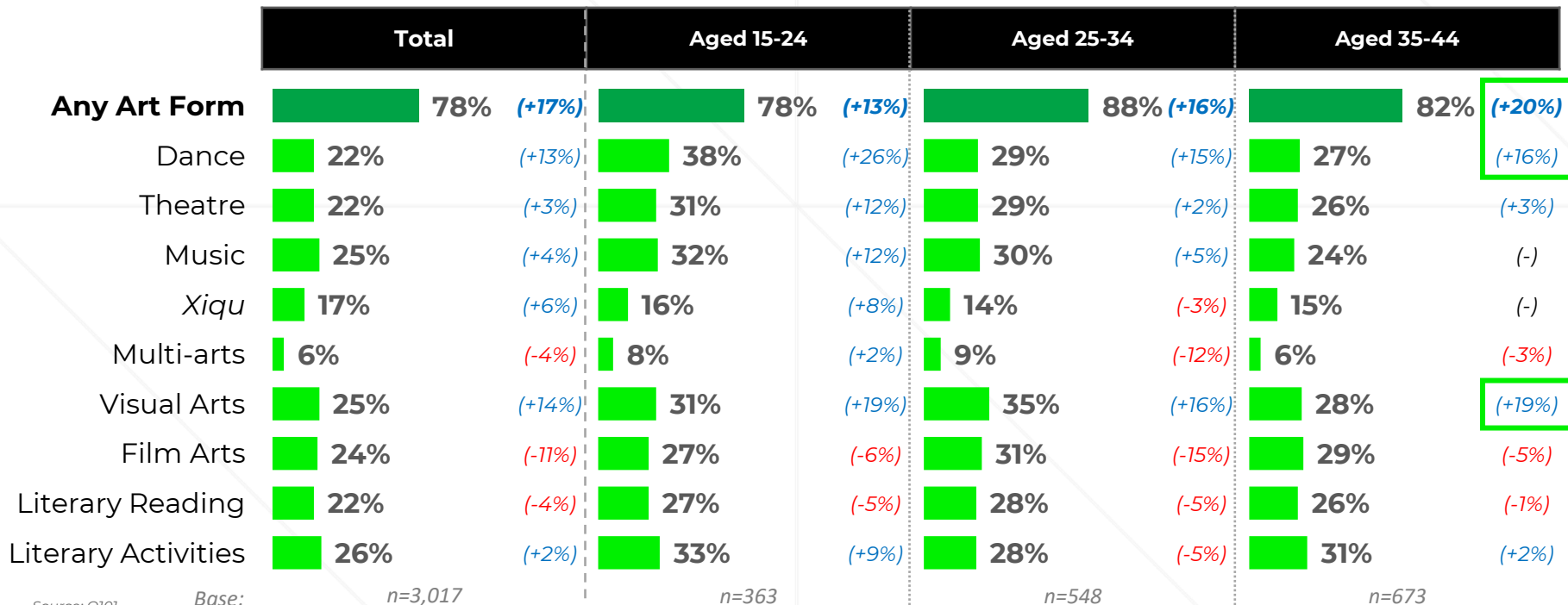
- Alternative-mode art participation increased significantly among Parents with children aged 0-14 in Dance and Visual Arts, and there was a significant decrease among Parents with children aged 15+ in Film Arts.



Source: Q101, Q102a, Q103a, Q104a, Q105a, Q106a, Q107a, Q108a, Q109a, Q110a
 () denotes gap vs. 2020's results
 Base: All respondents (n=3017)

Incidence of arts participation (any mode) from Jul'21 to Jul'22 – by age group(1)

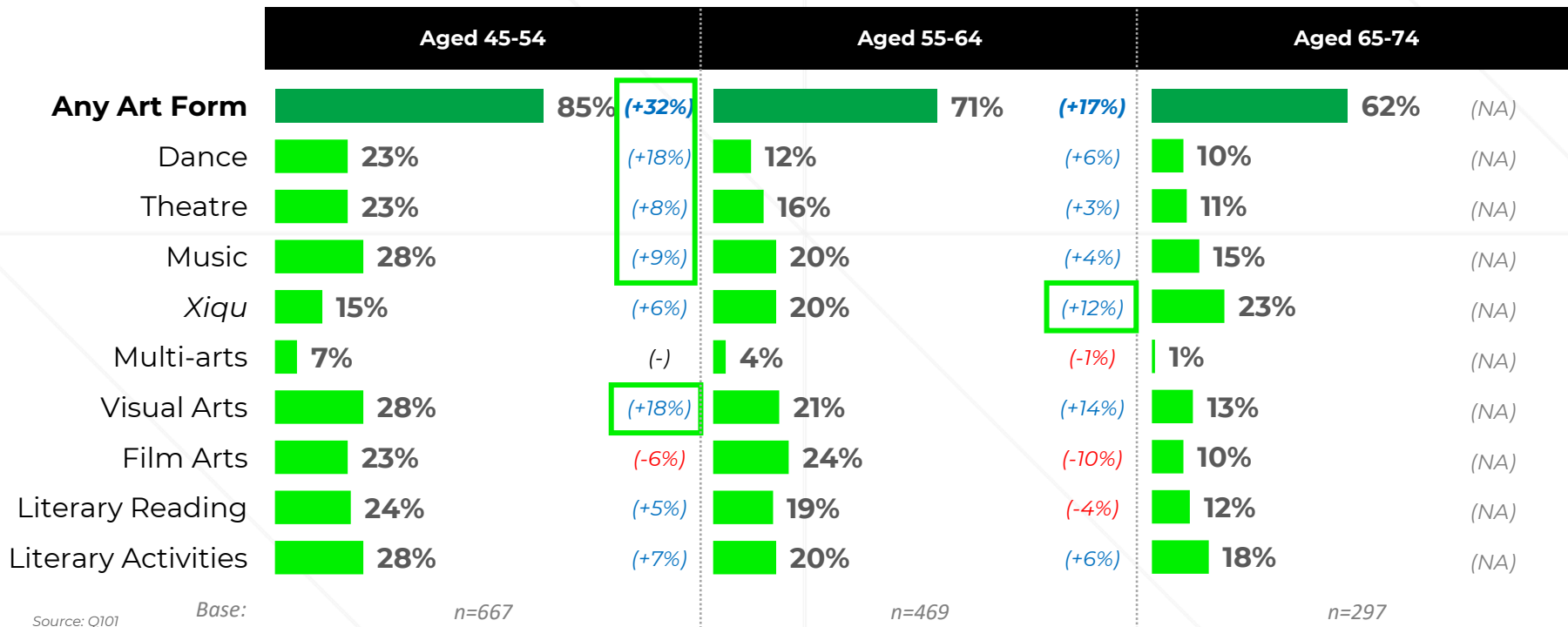
- Among those aged 15-44, participation in arts improved the most among those aged 35-44, likely due to increased attendance at Dance activities and Visual Arts exhibitions.
- On the other hand, for those aged 15-24, despite an increased rate of participation across the majority of activities, the amount that participated in any art form only improved by a relatively small amount, which suggested that more of these participants attended multiple art forms from Jul'21 to Jul'22.



Source: Q101
 (1) denotes gap vs. 2020's results
 Base: All respondents (n=3017)

Incidence of arts participation (any mode) from Jul'21 to Jul'22 – by age group(2)

- Arts participation improved the most among 45-54, largely driven by their increased participation in Dance, Visual Arts, Music and Theatre.
- On the other hand, participation in *Xiqu* surged the most among the older consumers aged 55-64.



Source: Q101
 () denotes gap vs. 2020's results
 Base: All respondents (n=3017)
 NA: Not applicable as the age of respondents in the 2020 survey was only up to 64

Incidence of arts participation (any mode) from Jul'21 to Jul'22 – by life segment (1)

- Substantially more Married persons without children participated in arts activity in 2021/22, largely driven by an improved interest in Visual Arts, Theatre and Literary Activities.
- On the other hand, although the percentage increase of arts participants among Students was only moderate, their participation increased across the majority of individual art forms, which suggested that substantially more of them partook in multiple art forms in 2021/22.

	Total		Students		Working singles		Married/co-habited persons w/o children	
Any Art Form	78%	(+17%)	68%	(+9%)	73%	(+14%)	76%	(+26%)
Dance	22%	(+13%)	29%	(+19%)	23%	(+16%)	19%	(+13%)
Theatre	22%	(+3%)	23%	(+5%)	25%	(+7%)	31%	(+19%)
Music	25%	(+4%)	27%	(+12%)	24%	(+3%)	24%	(+9%)
Xiqu	17%	(+6%)	15%	(+7%)	12%	(-)	17%	(+12%)
Multi-arts	6%	(-4%)	6%	(+3%)	7%	(-5%)	8%	(+4%)
Visual Arts	25%	(+14%)	28%	(+23%)	27%	(+14%)	29%	(+23%)
Film Arts	24%	(-11%)	27%	(-)	26%	(-4%)	23%	(-5%)
Literary Reading	22%	(-4%)	28%	(-1%)	23%	(-1%)	32%	(+10%)
Literary Activities	26%	(+2%)	31%	(+11%)	28%	(+4%)	30%	(+18%)

Source: Q101 Base: n=3,017
 () denotes gap vs. 2020's results
 Base: All respondents (n=3017)

n=181 n=649 n=183

Incidence of arts participation (any mode) from Jul'21 to Jul'22 – by life segment (2)

- Parents with children aged 15+ appeared to be the direct opposites of Students – despite a decrease in participation across the majority of art forms, relatively more of them became new arts participants in 2021/22, which suggested that relatively fewer of them participated in a variety of different art forms this year.
- For Parents with younger children aged 0-14, their improved arts participation was likely driven by their improved attendance to Dance activities and Visual Arts exhibitions.

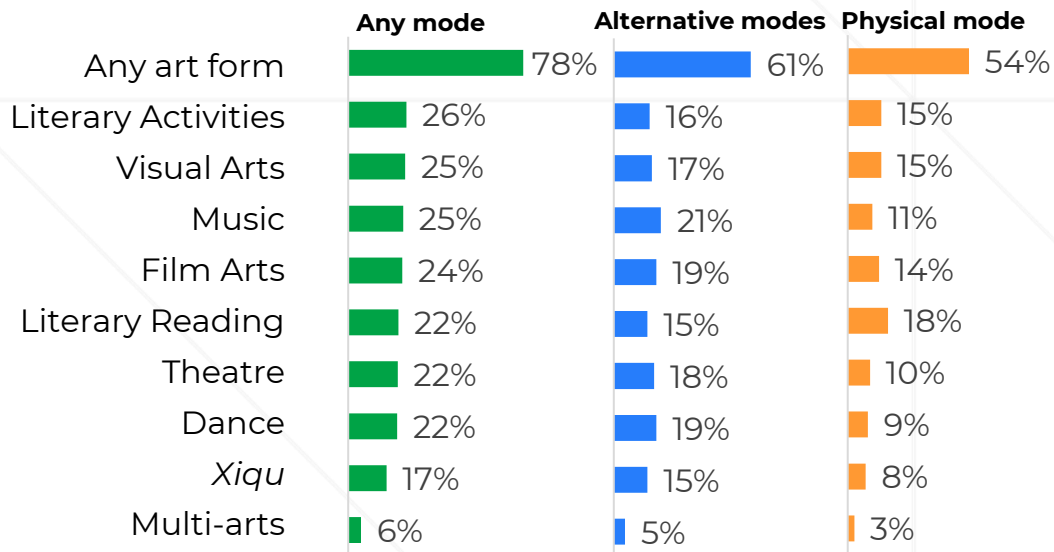
	Parents with children aged 0-4		Parents with children aged 5-14		Parents with children aged 15+		Retirees/ aged 65+	
Any Art Form	87% (+12%)		90% (+18%)		79% (+12%)		58% (NA)	
Dance	33% (+20%)		32% (+20%)		18% (+5%)		7% (NA)	
Theatre	29% (-)		29% (+3%)		18% (-3%)		10% (NA)	
Music	34% (+5%)		29% (+2%)		24% (-4%)		13% (NA)	
Xiqu	17% (-)		16% (-2%)		19% (-)		24% (NA)	
Multi-arts	11% (-7%)		7% (-6%)		4% (-3%)		1% (NA)	
Visual Arts	36% (+18%)		34% (+19%)		21% (+9%)		12% (NA)	
Film Arts	37% (-7%)		29% (-14%)		22% (-24%)		9% (NA)	
Literary Reading	28% (-1%)		26% (-8%)		20% (-12%)		10% (NA)	
Literary Activities	28% (-9%)		34% (+2%)		23% (-4%)		16% (NA)	
	n=289		n=543		n=940		N=204	

Source: Q101 Base: () denotes gap vs. 2020's results Base: All respondents (n=3017) NA: Not applicable as the age of respondents in the 2020 survey was only up to 64

Incidence of arts participation from Jul'21 to Jul'22 and future physical participation interest level^

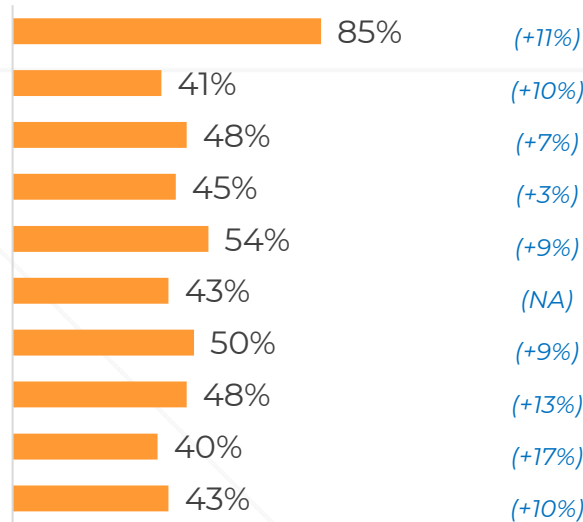
- Although participation levels in Literary Activities (any mode) and Literary Reading (physical mode) were relatively high compared to other art forms in the same mode, future physical participation interest in these two was not particularly high.
- In contrast, Film Arts and Theatre captured the most future interest in physical participation, while *Xiqu* and Dance recorded the most increase compared to results from 2020.

Incidence of arts participation in different art forms (Among all respondents)



Future physical participation interest in different art forms (Among all respondents)

() denotes gap vs. 2020's results



Source: Q101, Q102a, Q103a, Q104a, Q105a, Q106a, Q107a, Q108a, Q109a, Q110a
 Base: All respondents (n=3,017)
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Source: Q111
 Base: All respondents (n=3,017)
 ^denotes participation interest in physical mode among all respondents in the next 12 months after the 2022 survey.



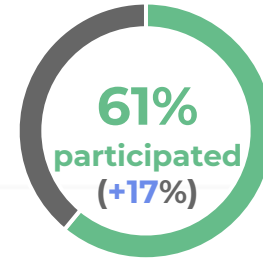
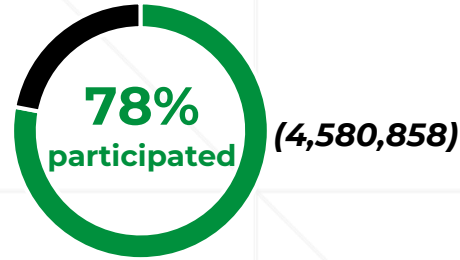
Arts participation (any mode) – single, duo vs. multi-types^

- There was also a rebound in the number of activities each person participated in, with an increase in all single, duo, and multi-type participants compared to 2020.

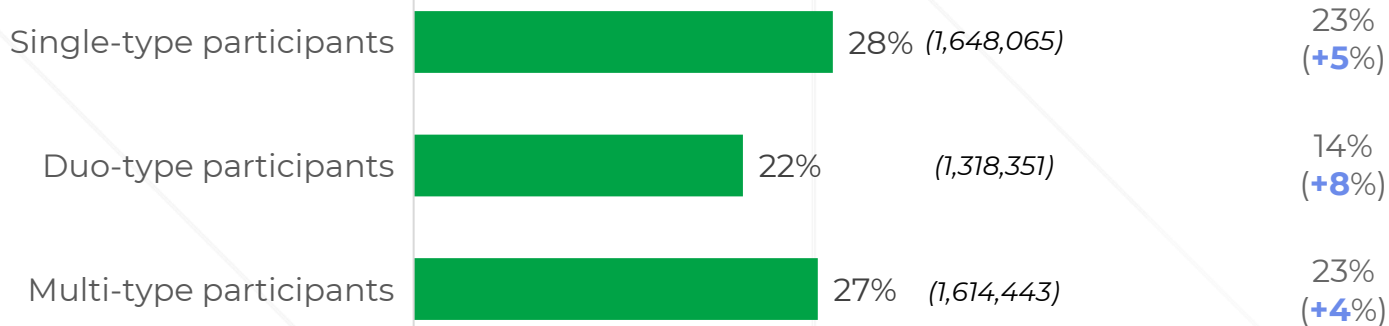
2021/22 Stage 3
(Projected population)

2020 Stage 1
(Gap)

Incidence of participation



No. of art forms participated in



Source: Q101
 Base: All respondents (n=3,017)
 ^Single-type participants: only participated in 1 art form; Duo-type participants: participated in 2 art forms; Multi-type participants: participated in 3 or more types of art forms (Caveat: Literary Reading and Literary Activities are treated as the same type for Duo-type and Multi-type participation)
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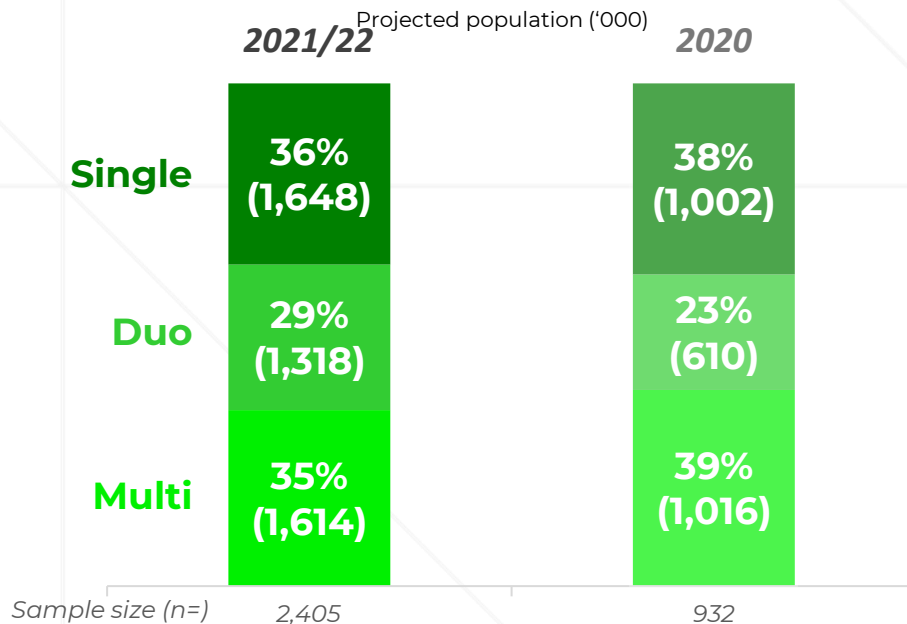
Arts participation (any mode) – single, duo vs. multi-types

- This represented an approximate increase of 600k single and multi-type participants, respectively, and a growth of 700k new duo-type participants vs. 2020.



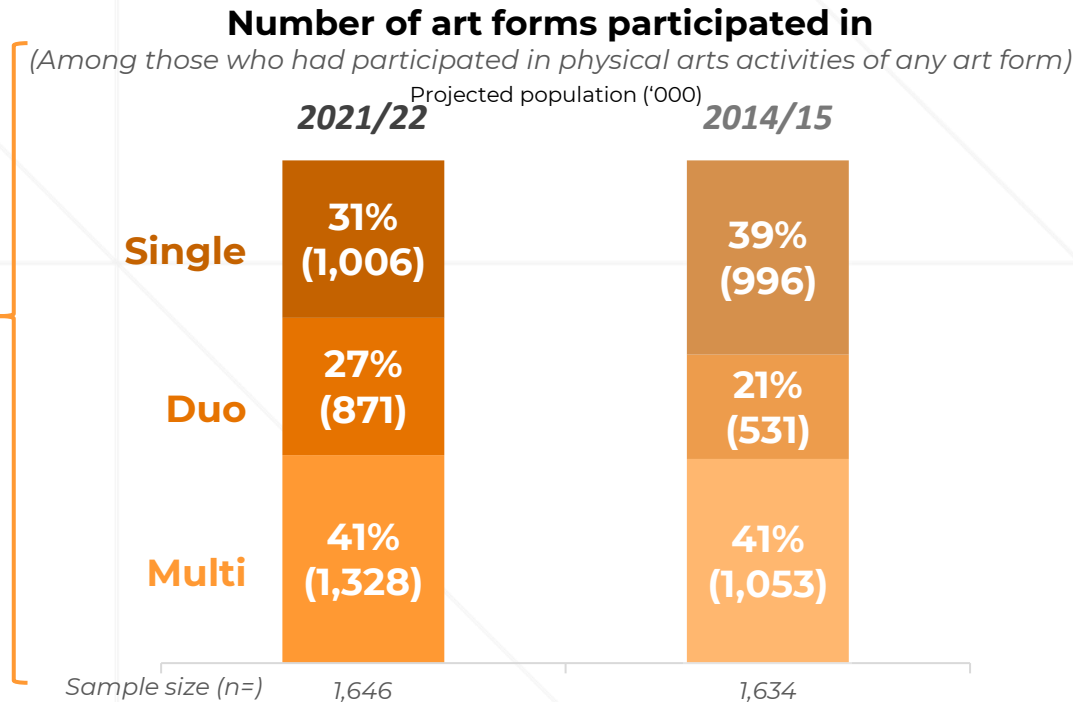
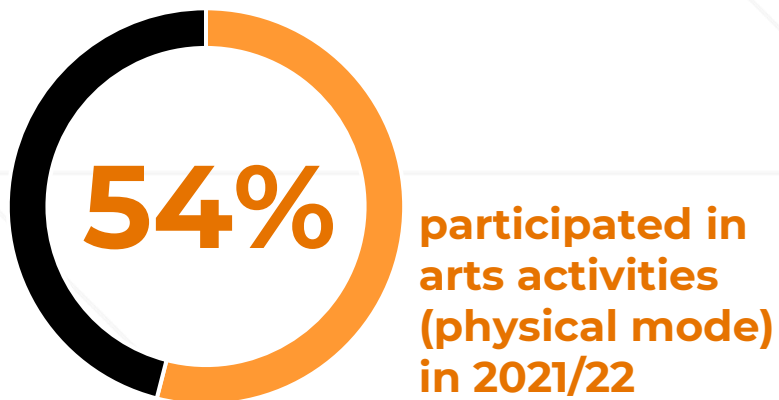
78% participated in arts activities (any mode) in 2021/22

Number of art forms participated in
(Among those who had participated in any art form)



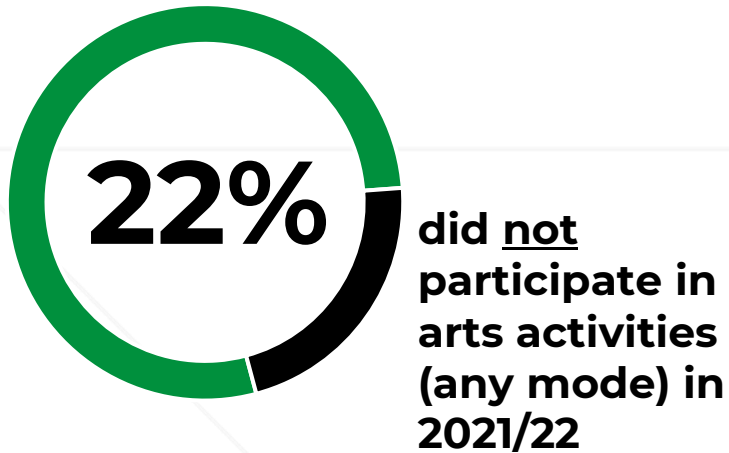
Arts participation (physical mode) – single, duo vs. multi-types

- Furthermore, compared to the relatively normal year of 2014/15, more consumers had branched out and participated in arts activities of other art forms through physical mode, with a higher proportion of duo-type participants and a smaller proportion that only participated in one type of activity.



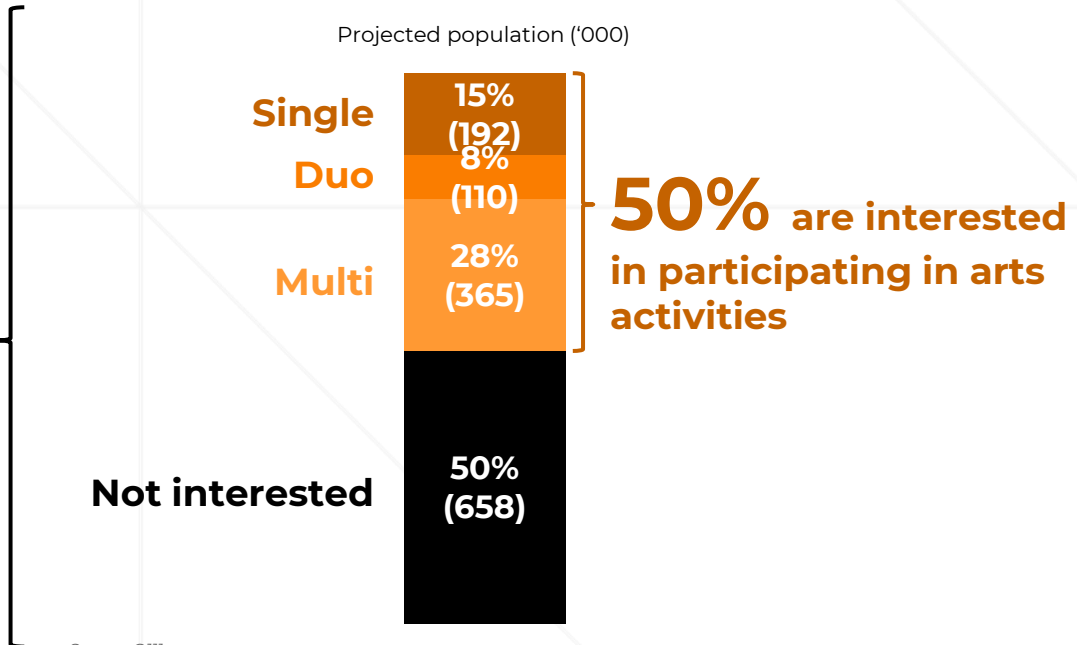
Future physical participation interest level[^] among non-participants of any mode – single, duo vs. multi-types

- Even half of the current non-participants were interested in participating in physical art activities in the next year, with more than a quarter claiming to be interested in participating in activities in multiple art forms.
- As such, arts participation would appear to have quite a positive outlook in the future.



Source: Q101
Base: All respondents (n=3,017)

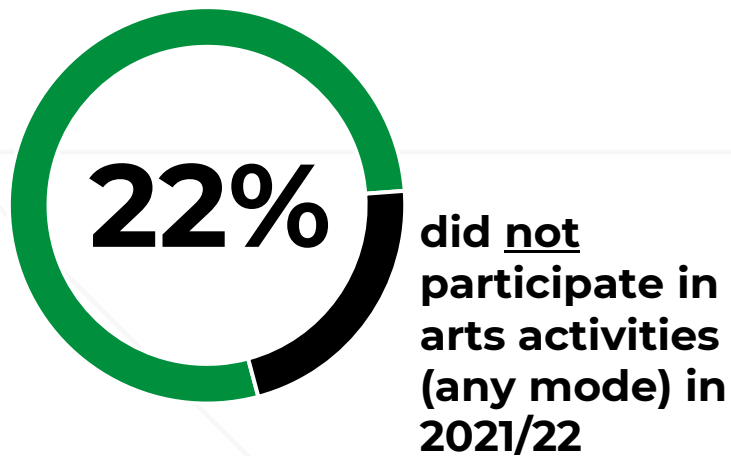
Future physical participation interest by number of art forms



Source: Q111
Base: Those who did not participate in arts activities (n=612)
[^]denotes participation interest in physical mode among all respondents in the next 12 months after the 2022 survey.

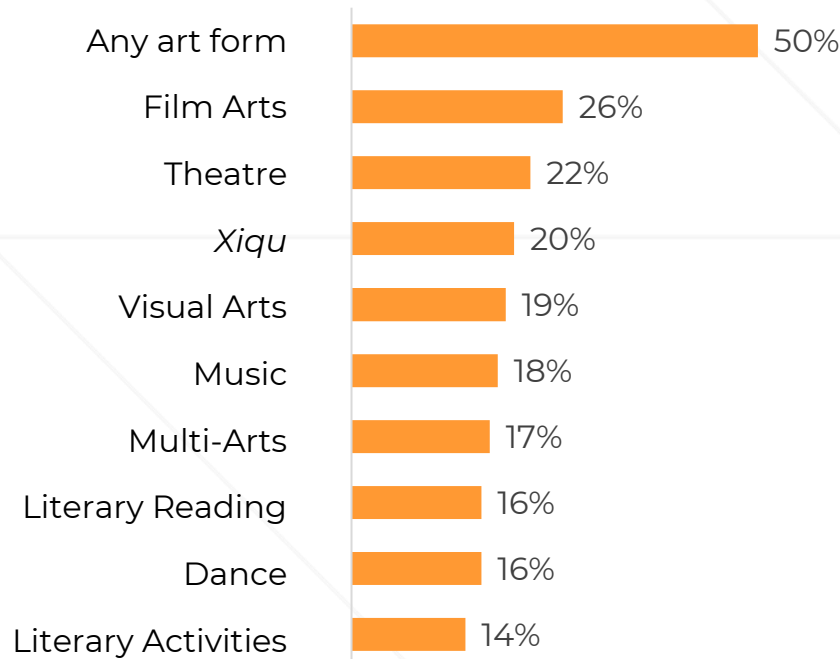
Future physical participation interest level[^] among non-participants of any mode – by art form

- Film Arts, Theatre and *Xiqu* received the most interest in future physical participation among non-participants.



Source: Q101
Base: All respondents (n=3,017)

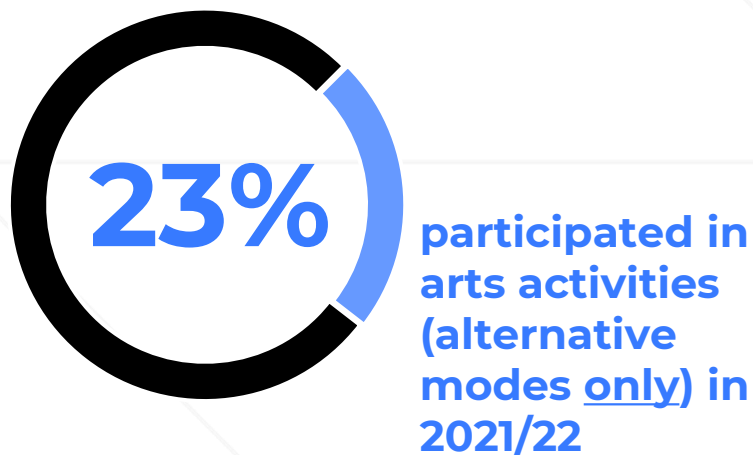
Future physical participation interest in different art forms



Source: Q111
Base: Those who did not participate in arts activities (n=612)
[^]denotes participation interest in physical mode among all respondents in the next 12 months after the 2022 survey.

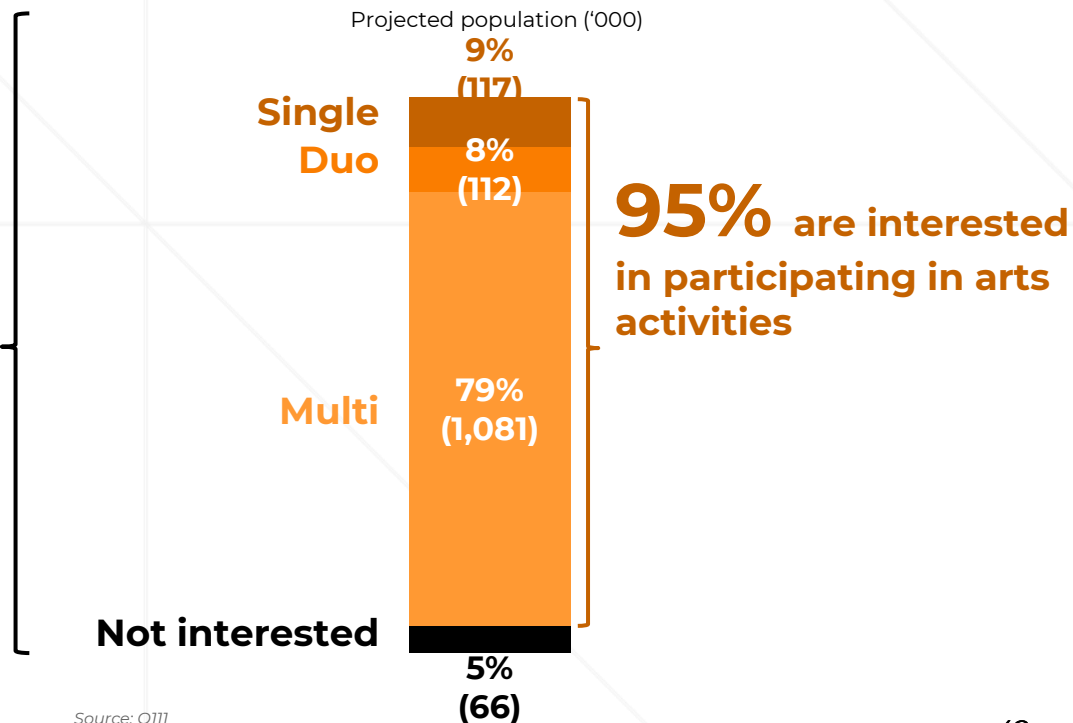
Future physical participation interest level^ among participants of alternative modes – single, duo vs. multi-types

- In comparison, existing arts participants through alternative modes were substantially more likely to continue participating in arts activities in person, where more than three-quarters stated that they would be interested in attending arts activities of at least 3 art forms.



Source: Q101
Base: All respondents (n=3,017)
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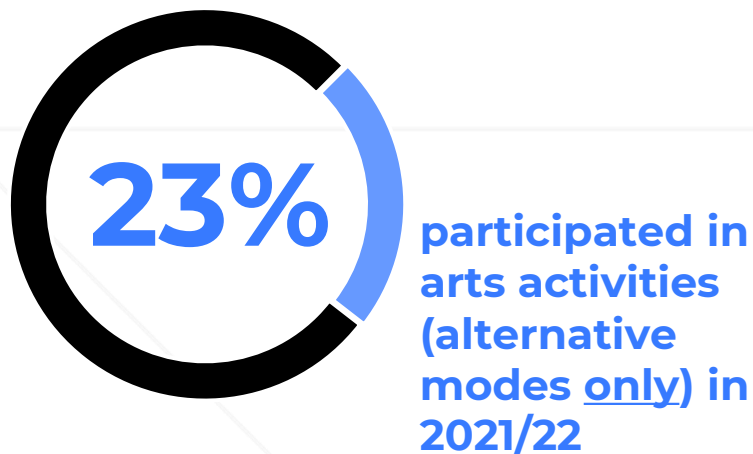
Future physical participation interest by number of art forms



Source: Q111
Base: Among those who had participated in art forms through alternative modes only (n=759)
^denotes participation interest in physical mode among all respondents in the next 12 months after the 2022 survey.

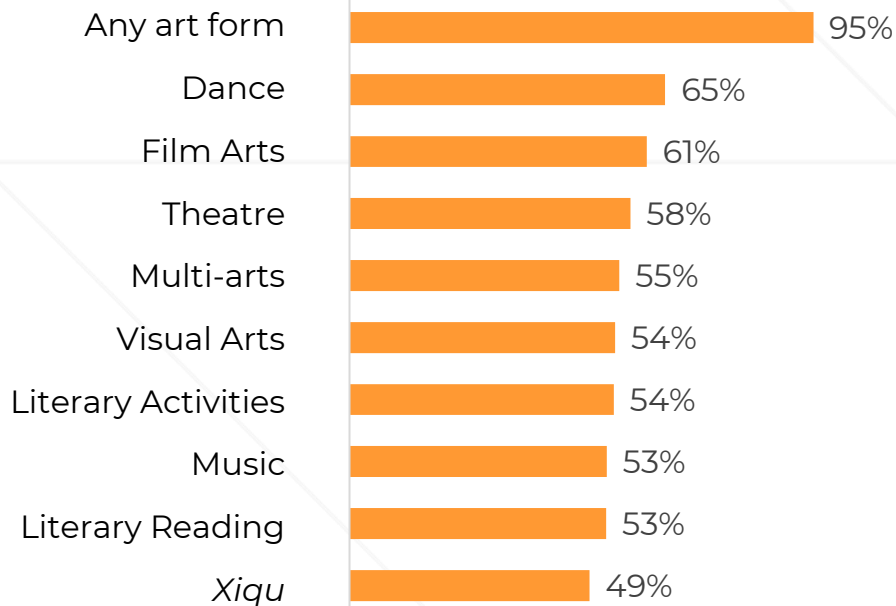
Future physical participation interest level^ among participants of alternative modes – by art form

- Those who participated in arts activities through alternative modes only were eager to attend arts events in person. Dance received the most interest in future physical participation among all art forms.
- While Multi-arts had the lowest participation amongst art forms, possibly because of declining overseas Multi-arts shows in HK during COVID-19 due to border control, future participation intention was high.



Source: Q101
Base: All respondents (n=3,017)
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Future physical participation interest in different art forms



Source: Q111
Base: Among those who had participated in art forms through alternative modes only (n=759)
^denotes participation interest in physical mode among all respondents in the next 12 months after the 2022 survey.



Annual participation frequency for arts activities in physical mode[^]

- Participation in physical mode activities improved across the board. In particular, there have been relatively large increases in participation frequency in Dance, Music, Theatre and Visual Arts activities since 2014/15.

On average, each person attended **6.5** arts activities in **physical** mode from Jul'21 to Jul'22



Free activities	Paid activities
2.9	3.6

Base: All participants of any art form in physical mode (n=1,646)

	Jul'21 to Jul'22	2018/19	2014/15
Dance (n=284)	4.0	2.9	1.9
Music (n=320)	3.8	3.0	1.8
Theatre (n=312)	3.6	2.3	1.7
Visual Arts (n=475)	3.4	3.0	1.7
Film Arts (n=415)	3.9	N/A	2.3
Xiqu (n=212)	3.6	2.8	2.1
Multi-arts (n=87)	3.8	2.3	2.3
Literary Activities (n=470)	2.8	2.8	N/A

Base: All participants of each respective art form in physical mode

Source: Q102b, Q103b, Q104b, Q105b, Q106b, Q107b, Q108b, Q110b

[^]denotes mean figures

Remark: 2014/15's Literary Reading/ Activities results are not suitable for comparisons due to different question settings as explained on slide 8.

Remark: 2018's Film Arts results are not suitable for comparisons due to different question settings.

Annual participation frequency for arts activities in alternative modes[^]

- As viewership frequency for Music, *Xiqu* and Visual Arts activities through alternative modes also improved, this suggested that these activities have surged in popularity.
- In contrast, substantially fewer people have viewed Multi-arts performances through alternative modes since 2020.

On average, each person viewed **12.5** arts activities in alternative modes from Jul'21 to Jul'22

<u>Free activities</u>	<u>Paid activities</u>
7.5	5.0

Base: All participants of any art form in alternative modes (n=1,932)

	Jul'21 to Jul'22	2020
Music (n=652)	5.9	3.4
<i>Xiqu</i> (n=421)	7.2	5.1
Visual Arts (n=556)	4.7	2.6
Theatre (n=570)	5.7	3.9
Dance (n=614)	5.7	4.0
Multi-arts (n=148)	5.1	7.9
Literary Activities (n=516)	4.8	3.9
Film Arts (n=597)	5.3	N/A

Base: All participants of each respective art form in alternative modes

Source: Q102b, Q103b, Q104b, Q105b, Q106b, Q107b, Q108b, Q110b

[^]denotes mean figures

Remark: 2020's Film Arts results are not suitable for comparisons due to different question settings.

Annual participation frequency for arts activities in any mode[^]

- Interestingly, although *Xiqu* had a relatively smaller pool of participants, they had quite a dedicated fan base that frequently attended these activities.
- Dance, Music, and Film Arts activities followed closely behind in 2nd to 4th place.

On average, each person attended

13.8 arts

activities in **any** mode from Jul'21 to Jul'22

Free activities

7.7

Paid activities

6.2

Base: All participants of any art form in any mode (n=2,405)



Jul'21 to Jul'22

Dance (n=705)	6.7
Theatre (n=706)	6.2
Music (n=765)	6.6
Xiqu (n=489)	7.8
Multi-arts (n=185)	5.9
Visual Arts (n=811)	5.2
Film Arts (n=758)	6.3
Literary Activities (n=814)	4.6

Base: All participants of each respective art form in any mode

Source: Q102b, Q103b, Q104b, Q105b, Q106b, Q107b, Q108b, Q110b

Base: All participants of each respective art form

[^]denotes mean figures



Projected annual attendance for arts activities in physical mode

- As such, due to the rise in participation in arts and the improvement in participation frequency of each art form, the projected annual attendance for arts activities had surged across the majority of art forms. However, the rise was especially prominent for Visual Arts and Film Arts, which had more than doubled attendance.
- On the other hand, the projected attendance for Multi-arts dropped due to fewer people participating and a lowered participation frequency among attendees.

In total,
17.8 million
 attended arts
 activities in
physical mode from
 Jul'21 to Jul'22



	Jul'21 to Jul'22	2014/15
Dance (n=284)	2.2M	0.7M
Theatre (n=312)	2.2M	1.0M
Music (n=320)	2.4M	1.1M
Xiqu (n=212)	1.7M	1.3M
Multi-arts (n=87)	0.6M	0.8M
Visual Arts (n=475)	3.0M	1.3M
Film Arts (n=415)	3.1M	1.3M
Literary Activities (n=470)	2.6M	N/A

Source: Q102b, Q103b, Q104b, Q105b, Q106b, Q107b, Q108b, Q110b

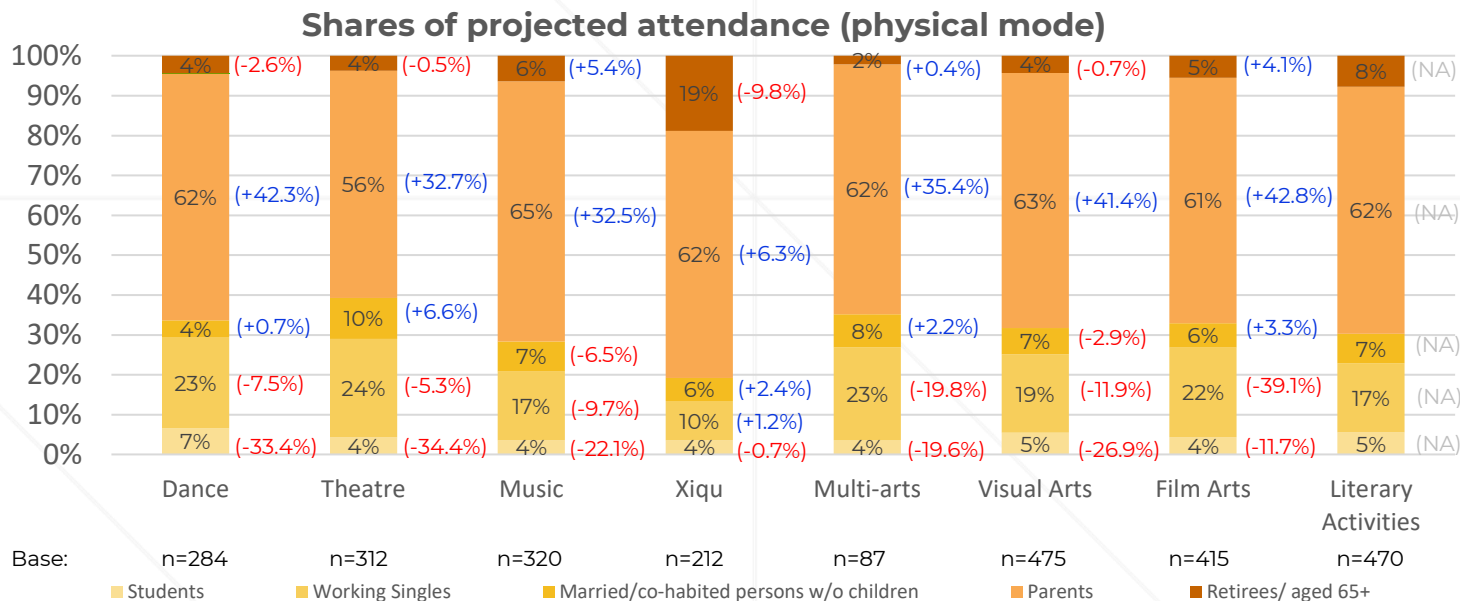
Base: All participants of each respective art form in physical mode

Remark: 2014/15's Literary Activities results are not suitable for comparisons due to different question settings as explained on slide 8.

Note: The projected attendance = summary of weighted individual responses.

Shares of projected attendance (physical mode) from Jul'21 to Jul'22 across art forms – by life segment

- Compared to 2014/2015, the share of projected attendance of parents increased significantly and contributed to more than half of attendance across all art forms. On the other hand, Students' share of attendance decreased across the board, resulting from reduced school events and a demographic change (see Appendix I).
- Compared to 2014/15, Working singles' attendance dropped in most art forms. However, the share of attendance of this group is still the second biggest across art forms except *Xiqu*.



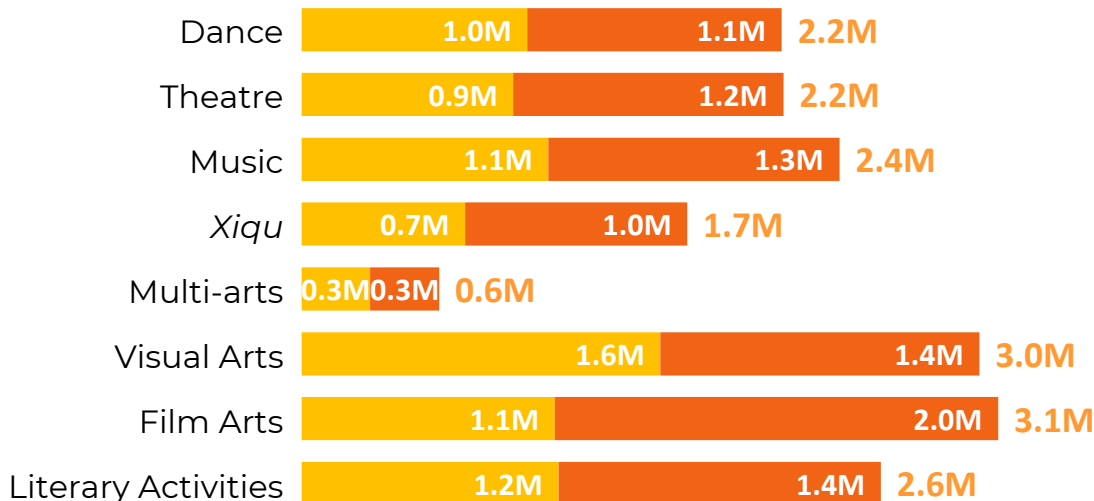
Source: Q102b, Q103b, Q104b, Q105b, Q106b, Q107b, Q108b, Q110b
 Base: All participants of each respective art form in physical mode
 () denotes gap vs. 2014/15's results
 Note: The projected attendance = summary of weighted individual responses.



Projected annual attendance for arts activities in physical mode – free vs. paid

- For physical mode, Film Arts had the highest projected annual attendance in general, closely followed by Visual Arts, which had comparatively higher projected attendance in free activities than paid activities as compared to other art forms.

■ Total physical
■ Free
■ Paid



17.8M

(8.0M+9.8M)

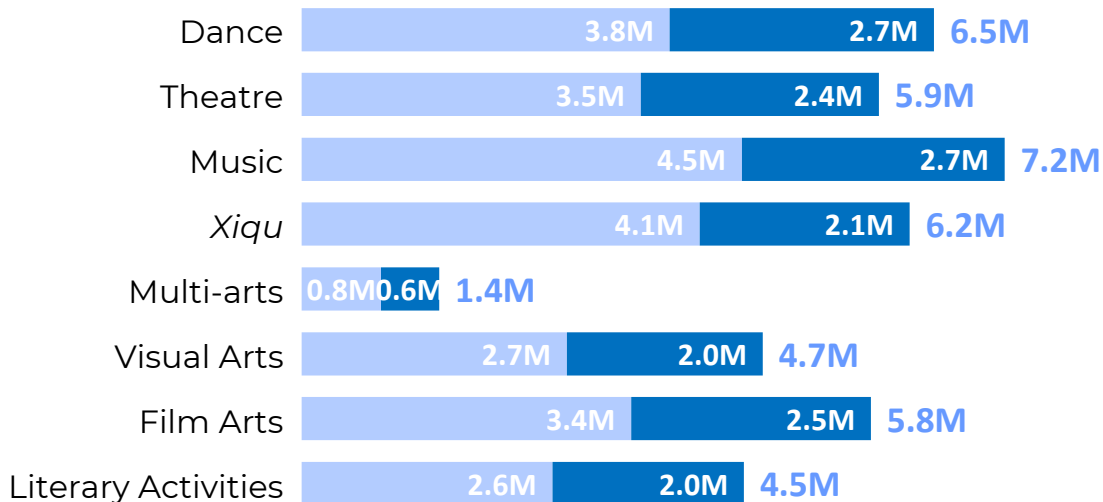
Projected annual attendance on arts activities in physical mode from Jul'21 to Jul'22.

Source: Q102b, Q103b, Q104b, Q105b, Q106b, Q107b, Q108b, Q110b
 Base: Among those who had participated in any art form by physical mode (n=1,646)
 Note: The projected attendance = summary of weighted individual responses.

Projected annual attendance for arts activities in alternative modes – free vs. paid

- For alternative modes, there were more free projected annual attendance for activities of all art forms, particularly Music and *Xiqu*.
- Music had the highest projected annual attendance in alternative modes, followed by Dance. Notably, the two art forms' paid alternative-mode attendance are also the highest across the board.

■ Total alternative ■ Free ■ Paid



42.3M

(25.3M+17.0M)

Projected annual attendance on arts activities in alternative modes from Jul'21 to Jul'22.

Source: Q102b, Q103b, Q104b, Q105b, Q106b, Q107b, Q108b, Q110b

Base: Among those who had participated in any art form by alternative modes (n=1,932)

Note: The projected attendance = summary of weighted individual responses.

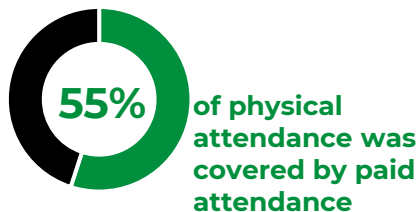
Projected annual attendance for free and paid arts activities – any mode

- As a whole, the projected annual attendance from Jul'21 to Jul'22 was 60.1M. COVID-19 likely greatly influenced arts participation in 2021/22, as a substantial amount of overall participation came from activities through alternative modes when many performing venues were closed and people were advised to stay at home.
- Consequently, those who participated in arts events through alternative modes would be potential arts participants who could be absorbed as the audience in physical performing venues.

17.8M

Physical-mode attendance

- Free activities: 8.0M
- Paid activities: 9.8M



42.3M

Alternative-mode attendance

- Free activities: 25.3M
- Paid activities: 17.0M



60.1 million

Projected annual attendance from Jul'21 to Jul'22.

Free activities:
33.3M

Paid activities:
26.8M

Annual physical attendance
(excl. Literary Reading/Activities)

2021/22

15.2M

2014/15

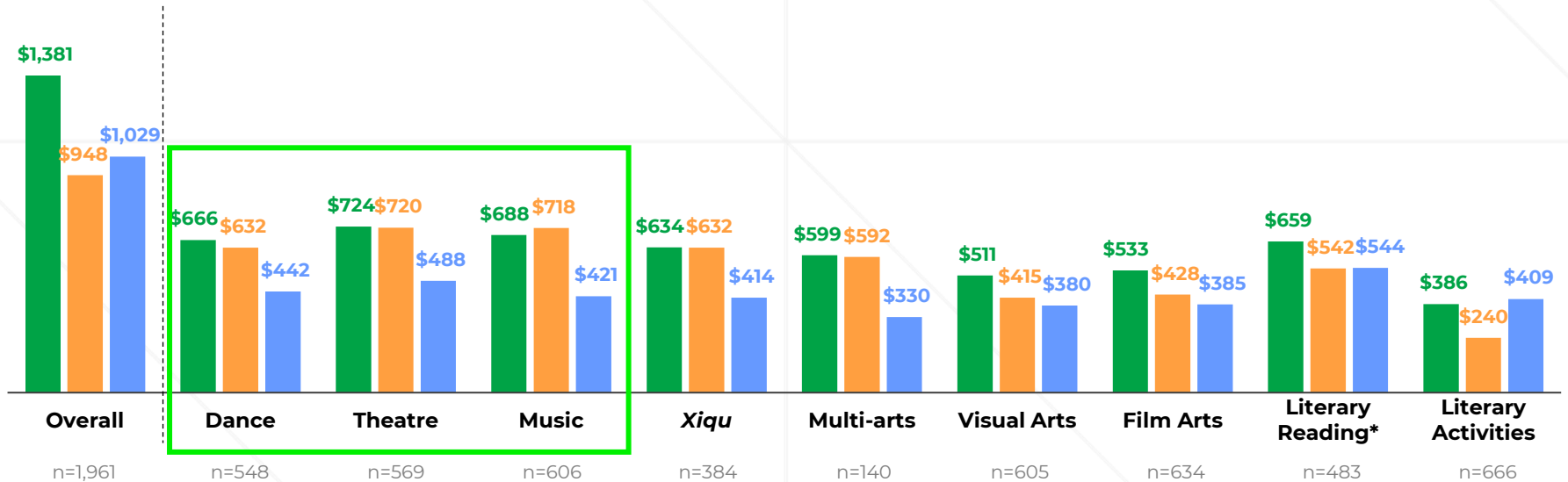
7.5M

Source: Q102b, Q103b, Q104b, Q105b, Q106b, Q107b, Q108b, Q110b
Base: Among those who had participated in any art form (n=2,405)
Note: The projected attendance = summary of weighted individual responses.

Average annual expenditure for core art forms

- As a whole, average spending was highest among Theatre, Music and Dance participants.
- Average spending through alternative modes was generally lower across the majority of art forms, though, especially for Music and Multi-arts.

■ Any mode ■ Physical modes ■ Alternative modes



Source: Q102c, Q103c, Q104c, Q105c, Q106c, Q107c, Q108c, Q109c, Q110c

^denotes mean figures

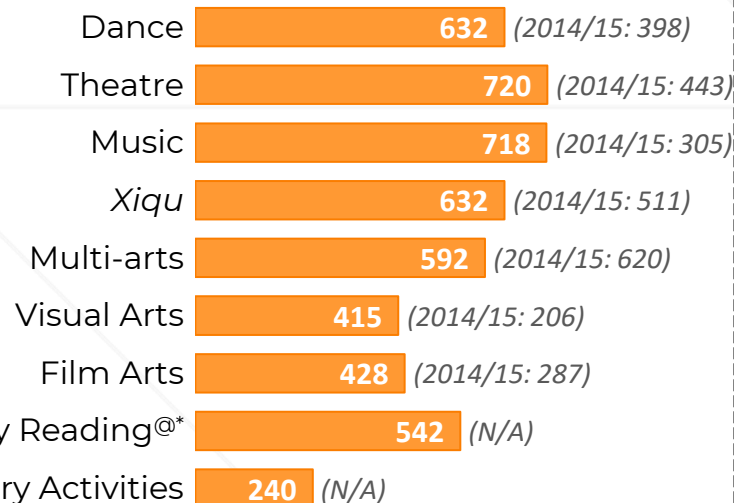
* The expenditure includes money spent on both children/ Juvenile Literature and non-children/ Juvenile literary books

Base: All participants of each respective art form that spent money on paid activities in any mode, physical modes and alternative modes respectively

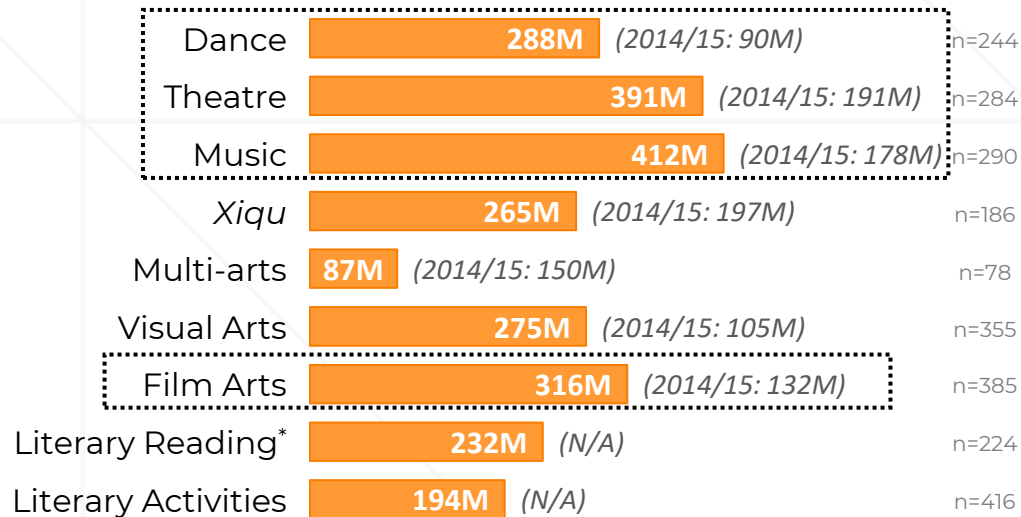
Annual expenditure for core art forms in physical mode

- Since 2014/15, the average spending on arts in physical modes increased across most art forms, though Multi-Arts was an exception.
- As a result, the projected expenditure for the art forms has also increased. In particular, projected spending for Dance, Theatre, Music and Film Arts increased by the largest margins, which was also likely driven by the increased incidence of participation since 2014/15.

Average annual expenditure



Projected annual expenditure



Source: Q102c, Q103c, Q104c, Q105c, Q106c, Q107c, Q108c, Q109c, Q110c

Base: All participants of each respective art form that spent money on paid activities in physical mode

* The expenditure includes money spent on both children/ Juvenile Literature and non-children/ Juvenile literary books.

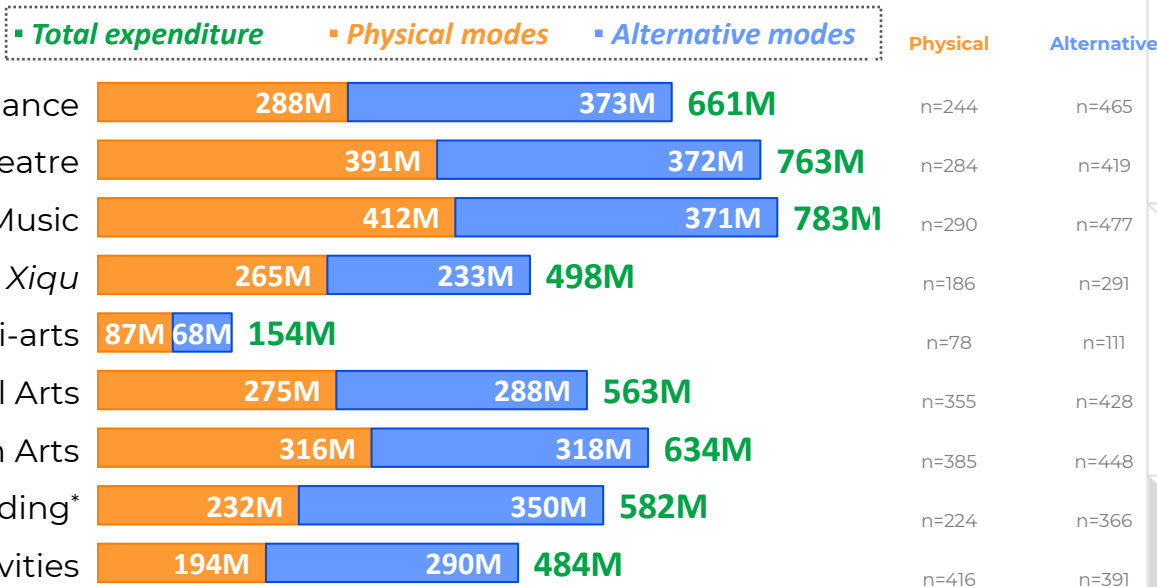
Remark: 2014/15's Literary Reading/ Activities results are not suitable for comparisons due to different question settings as explained on slide 8.

Note: The projected expenditure = summary of weighted individual responses.



Projected annual expenditure for core art forms

- As a whole, it was projected that the arts industry earned 5.1B in total, in which Music, Theatre and Dance activities had the largest contributions.
- It's worth-noting that, projected annual expenditure in Dance, Literary Reading and Literary Activities in alternative modes is relatively higher than that in physical mode.



5.1B (2.5B+2.7B)
Projected annual expenditure on arts participation from Jul'21 to Jul'22.

Source: Q102c, Q103c, Q104c, Q105c, Q106c, Q107c, Q108c, Q109c, Q110c
 Base: Among those who had participated in any art form (n=2,405)
 * The expenditure includes both children/ Juvenile Literature and non-children/ Juvenile Literature
 Note: The projected expenditure = summary of weighted individual responses.

Projected expenditure (physical mode) from Jul'21 to Jul'22 across art forms – by life segment

- Parents with children aged 15+ had the highest annual expenditure for activities in person among all life segments, and they spent more on Music and *Xiqu*.

	Students	Working singles	Married/co-habited persons w/o children	Parents with children aged 0-4	Parents with children aged 5-14	Parents with children aged 15+	Retirees/aged 65+	Base
Dance	19.7M	53.8M	15.4M	27.7M	69.8M	86.2M	14.6M	n=244
Theatre	11.4M	96.1M	53.5M	40.1M	62.0M	110.9M	14.7M	n=284
Music	13.5M	88.2M	29.8M	47.6M	67.6M	137.9M	26.0M	n=290
<i>Xiqu</i>	6.8M	16.0M	16.3M	12.8M	34.3M	118.5M	58.1M	n=186
Multi-arts	5.3M	19.5M	13.0M	14.8M	8.3M	24.0M	0.4M	n=78
Visual Arts	13.6M	54.3M	15.3M	48.3M	56.6M	70.5M	12.4M	n=355
Film Arts	11.5M	74.3M	21.7M	52.3M	49.3M	92.0M	12.1M	n=385
Literary Reading	14.4M	57.5M	10.6M	26.7M	47.4M	66.3M	6.6M	n=224
Literary Activities	9.2M	34.8M	19.0M	17.0M	41.3M	56.9M	15.6M	n=416

Source: Q102c, Q103c, Q104c, Q105c, Q106c, Q107c, Q108c, Q109c, Q110c

Base: All participants of each respective art form that spent money on paid activities in physical mode

Note: The projected expenditure = summary of weighted individual responses.

Projected expenditure (alternative modes) from Jul'21 to Jul'22 across art forms – by life segment

- Parents with children aged 5+ had a higher annual expenditure for activities through alternative modes among all life segments, Parents with children aged 15+ spent more on Music and Literary Reading, and Parents with children aged 5-14 spent more on Theatre and Dance.

	Students	Working singles	Married/co-habited persons w/o children	Parents with children aged 0-4	Parents with children aged 5-14	Parents with children aged 15+	Retirees/aged 65+	Base
Dance	20.1M	58.5M	20.8M	64.8M	101.9M	92.8M	13.3M	n=465
Theatre	15.1M	65.3M	31.8M	51.2M	102.8M	90.3M	15.8M	n=419
Music	17.5M	56.1M	20.8M	58.9M	87.2M	114.7M	14.6M	n=477
<i>Xiqu</i>	13.2M	33.1M	9.1M	26.1M	56.2M	77.1M	18.0M	n=291
Multi-arts	3.4M	6.5M	6.9M	16.0M	22.4M	12.4M	0.02M	n=111
Visual Arts	16.7M	42.8M	18.6M	42.0M	87.1M	75.1M	6.0M	n=428
Film Arts	19.1M	56.2M	21.7M	61.7M	69.7M	84.4M	5.3M	n=448
Literary Reading	18.2M	66.0M	24.3M	56.1M	80.5M	101.5M	2.3M	n=366
Literary Activities	18.1M	38.6M	20.1M	40.9M	77.7M	80.6M	14.3M	n=391

Source: Q102c, Q103c, Q104c, Q105c, Q106c, Q107c, Q108c, Q109c, Q110c

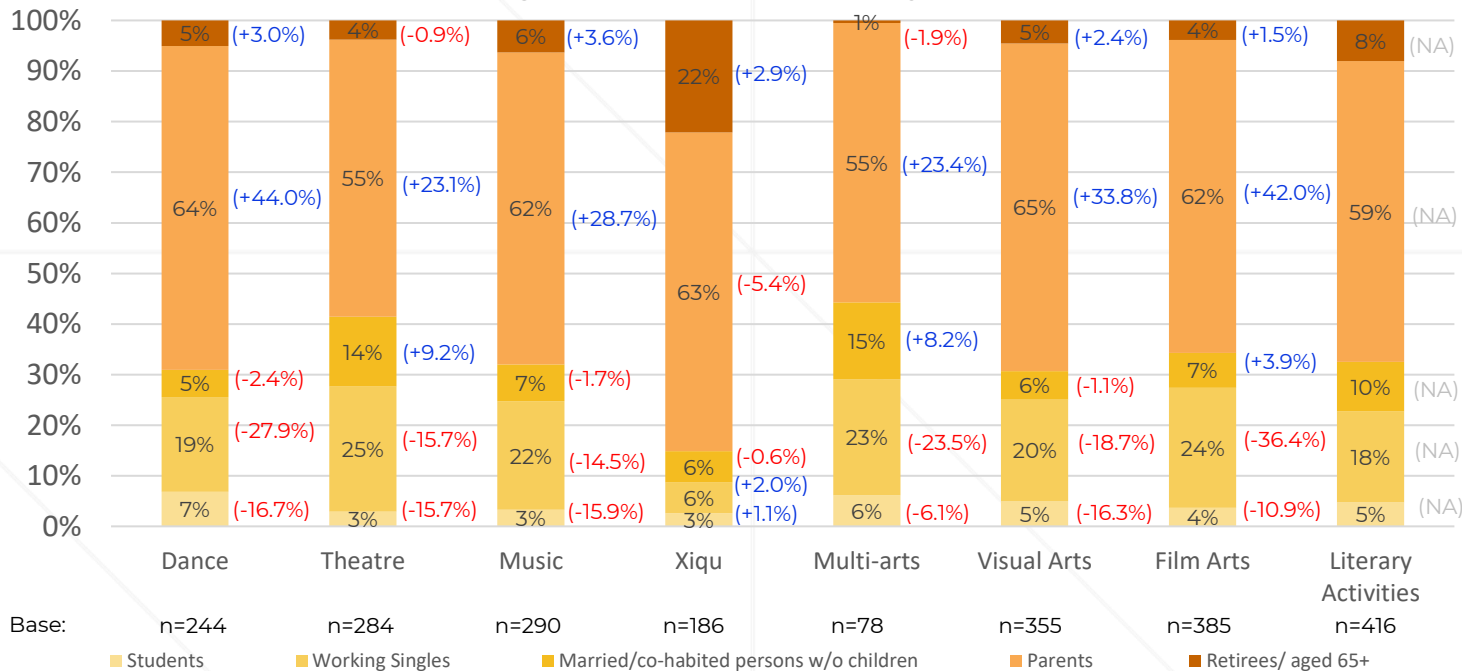
Base: All participants of each respective art form that spent money on paid activities in alternative modes

Note: The projected expenditure = summary of weighted individual responses.

Shares of projected expenditure (physical mode) from Jul'21 to Jul'22 across art forms – by life segment

- Similar to attendance, parents again contributed the largest share of spending (55%-65%) across art forms, replacing the main expenditure contributor in the 2014/15 study - Working singles.
- Working singles' shrinking expenditure share is partly due to a demographic shift since 2015 (see Appendix I).

Shares of projected expenditure (physical mode)



Source: Q102c, Q103c, Q104c, Q105c, Q106c, Q107c, Q108c, Q110c

Base: All participants of each respective art form that spent money on paid activities in physical mode

() denotes gap vs. 2014/15's results

Note: The projected expenditure = summary of weighted individual responses.

Annual expenditure for ticketed cultural activities – any mode

- Among the three kinds of ticketed cultural activities, average expenditure was highest on Stand-up Comedy / Pop Music Show / Concert / Variety Show / Award Ceremony.
- Despite that, the projected expenditure on Movies was the highest (\$1.6B) among all due to a larger size of audience.

Average expenditure

\$560

Stand-up Comedy / Pop Music Show / Concert / Variety Show / Award Ceremony

n=231

\$445

Movies (including screenings in Film Arts)

n=255

\$244

Science Museum/ Space Museum/ History Museum / Hong Kong Museum of Coastal Defence/ Madame Tussauds Hong Kong

n=177

Projected expenditure

1.6B

Stand-up Comedy / Pop Music Show / Concert / Variety Show / Award Ceremony

1.6B

Movies (including screenings in Film Arts)

0.6B + 1.0B

Film arts

Movies (excl. Film Arts)

0.7B

Science Museum/ Space Museum/ History Museum / Hong Kong Museum of Coastal Defence/ Madame Tussauds Hong Kong

=

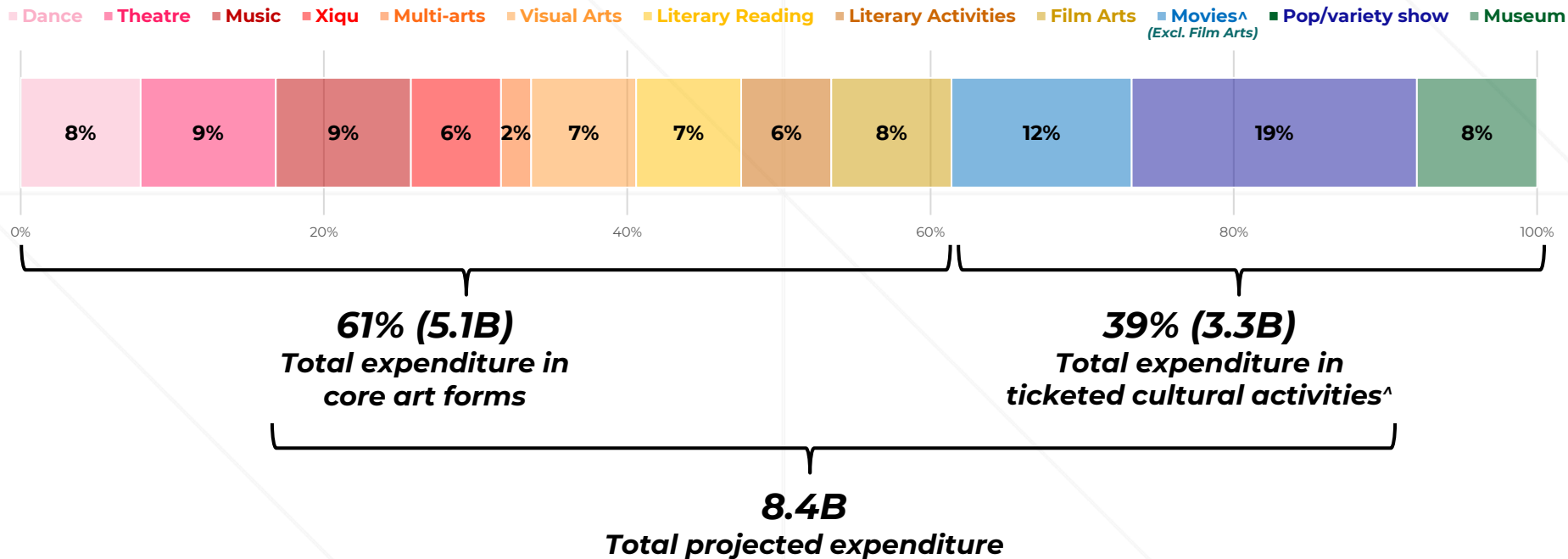
\$3.9B

Total projected annual expenditure from Jul'21 to Jul'22.

Source: Q114
Base: All respondents (n=3,017)
Note: The projected expenditure = summary of weighted individual responses.

Share of projected expenditure (any mode) – by art form and ticketed cultural activity

- The total projected expenditure on ticketed arts and cultural activities was 8.4B, in which spending on activities of core art forms (5.1B) accounted for more than three fifths of the market share.



Source: Q102c, Q103c, Q104c, Q105c, Q106c, Q107c, Q108c, 109c, Q110c, Q114

Base: Among those who had participated in any traditional art form or ticketed cultural activity (n=2,607)

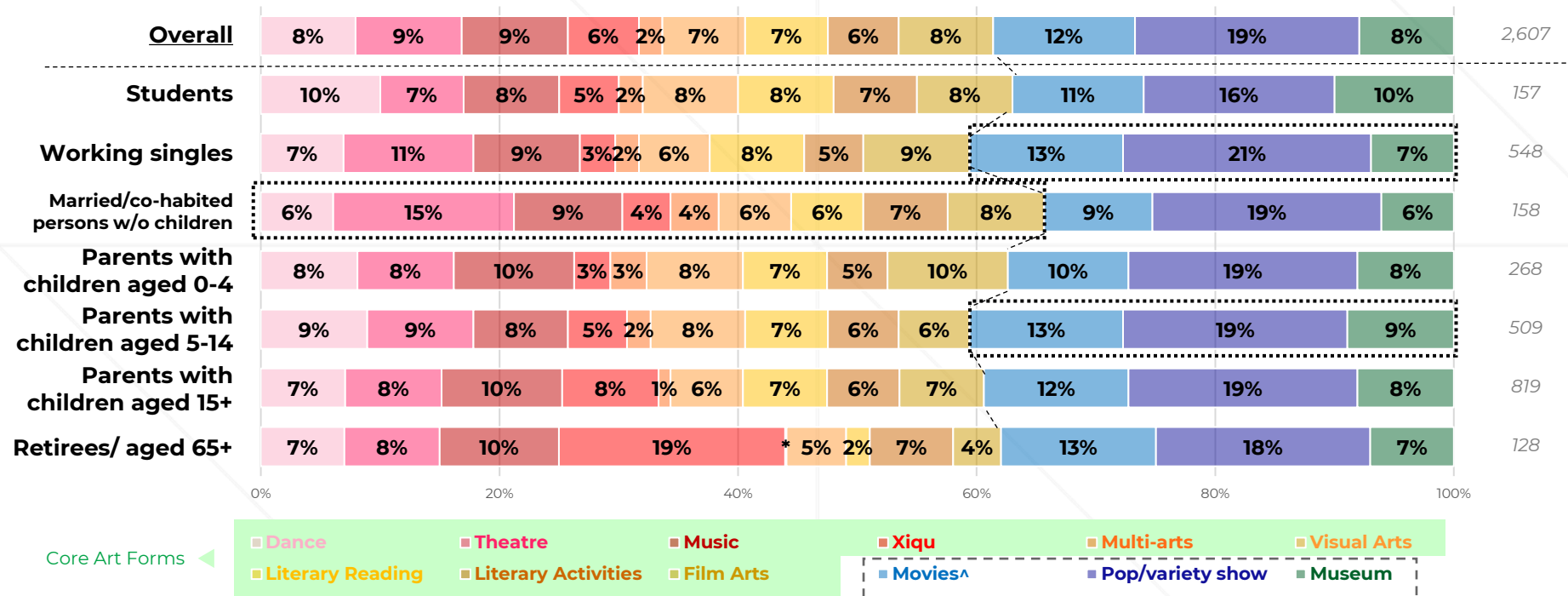
Note: The projected expenditure = summary of weighted individual responses.

[^]The total projected annual expenditure on ticketed cultural activities is reduced as Film Arts was assumed to be included in the expenses on movies.

Share of projected expenditure (any mode) from Jul'21 to Jul'22 across art forms and ticketed cultural activities – by life segment

- Among all ticketed arts and cultural activities, Married / co-habited persons w/o children reported the highest share of expenditure on core art forms, particularly on Theatre.
- Working singles and Parents with children aged 5-14 had the highest share of ticketed cultural activities.

Base:



Source: Q102c, Q103c, Q104c, Q105c, Q106c, Q107c, Q108c, 109c, Q110c, Q114
 Base: Among those who had participated in any traditional art form or ticketed cultural activity (n=2,607)
 Note: The projected expenditure = summary of weighted individual responses.
[^]The total projected annual expenditure on ticketed cultural activities is reduced as Film Arts was assumed to be included in the expenses on movies.

Ticketed Cultural Activities

New technologies in arts programmes

80%

Claimed they were aware of arts-tech.

60%

Claimed they had experienced arts-tech via any mode.

3%

Claimed they were solely driven to participate due to arts-tech.

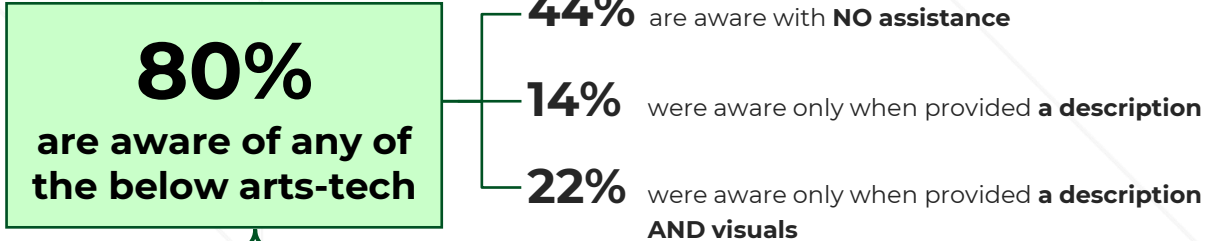
Source: Q201, Q202, Q202a, Q203, Q207
Base: All respondents (n=3,017)

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Claimed awareness of arts-tech

- Arts-tech appeared to be a prominent feature in the market, as 4 fifths were already aware of it, similar to the arts participation level of any mode (78%). More than 2 fifths mentioned they were aware of it without requiring any assistance/ prompts. In particular, Virtual reality, Image projection, and Immersive video installations topped the board of most well-known arts-tech.



52%

Virtual Reality
(虛擬實景)



50%

Image Projection
(舞台影像投射)



48%

Immersive Video Installations
(沉浸式影像裝置)



46%

Live Streaming
(實時同步串流)



45%

Non-Fungible Token
(NFT/ 非同質性代幣)



41%

Virtual Avatar
(虛擬化身)



41%

Sound Art
(聲音藝術)

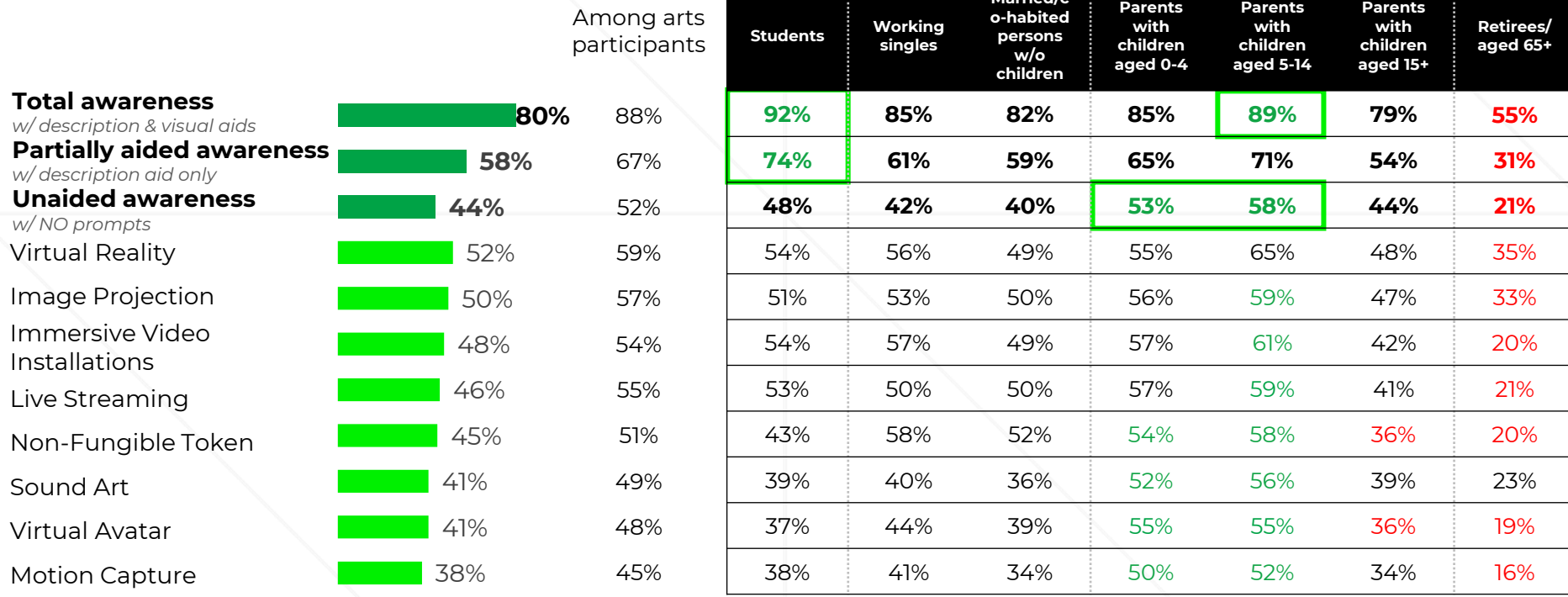


38%

Motion Capture
(動作捕捉技術)

Claimed awareness of arts-tech – by life segment

- Likely because they were younger and more digitally-savvy, Students were more familiar with arts-tech and fewer required visual aids to be able to recall it.
- Interestingly, Parents with younger children aged 0-14 were also much more aware of the wide variety of arts-tech, even without any description and visual aids.



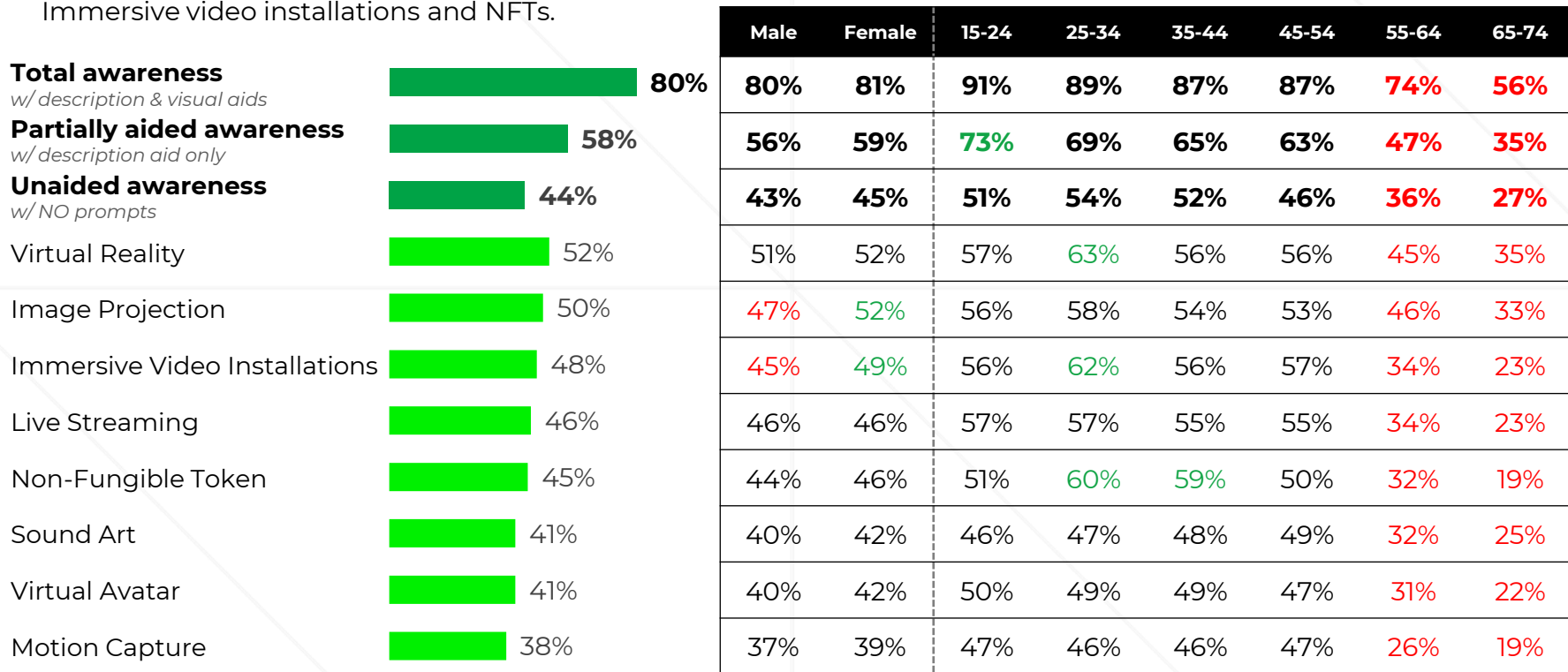
Source: Q201, Q202, Q202a
Base: All respondents (n=3,017)

Green/Red indicates subgroup figures that are significantly higher/lower than the total results for all respondents at 95% CI.

Sample size (n=) 2405

Claimed awareness of arts-tech – by gender and age

- Unsurprisingly, as a whole, arts-tech was more well-known among relatively younger audiences aged 15-24. However, those aged 25-34 display a higher level of awareness towards most individual arts-tech, especially Virtual reality, Immersive video installations and NFTs.



Source: Q201, Q202, Q202a
Base: All respondents (n=3,017)

Green/Red indicates subgroup figures that are significantly higher/lower than the total results for all respondents at 95% CI.

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Sample size (n=) 1,355 1,662 363 548 673 667 469 297

Claimed incidence of experiencing arts-tech (any mode) – by art form

- Dance, Theatre and Music activities each had a relatively higher proportion of Live streaming and Image projection elements. However, Dance incorporated more of the former, while Theatre contained more of the latter.
- Visual Arts activities had relatively more Immersive video installations and Virtual reality elements, whereas around a quarter of Multi-arts activities had Virtual reality and Motion capture.

	Any Art Form	Dance	Theatre	Music	Xiqu	Multi-Arts	Visual Arts	Film Arts	Literary Activities	
Any Arts-tech	72%	78%	71%	72%	61%	66%	71%	61%	52%	
Live Streaming	<u>56%</u>	<u>31%</u>	<u>18%</u>	<u>21%</u>	<u>17%</u>	16%	11%	14%	7%	
Image Projection	<u>60%</u>	<u>23%</u>	<u>33%</u>	<u>22%</u>	15%	14%	17%	<u>17%</u>	7%	
Immersive Video Installations	54%	<u>17%</u>	16%	<u>19%</u>	<u>18%</u>	<u>17%</u>	<u>20%</u>	<u>16%</u>	<u>13%</u>	
Motion Capture	<u>55%</u>	17%	<u>19%</u>	<u>19%</u>	<u>22%</u>	<u>23%</u>	16%	<u>15%</u>	11%	
Virtual Reality	54%	16%	16%	17%	13%	<u>27%</u>	<u>20%</u>	14%	11%	
Virtual Avatar	50%	14%	14%	13%	11%	15%	<u>18%</u>	<u>15%</u>	<u>12%</u>	
Sound Art	49%	10%	11%	18%	12%	13%	13%	14%	<u>12%</u>	
Non-Fungible Token	41%	8%	11%	12%	10%	14%	13%	12%	9%	
	Sample size (n=)	2,405	705	706	765	489	185	811	758	814

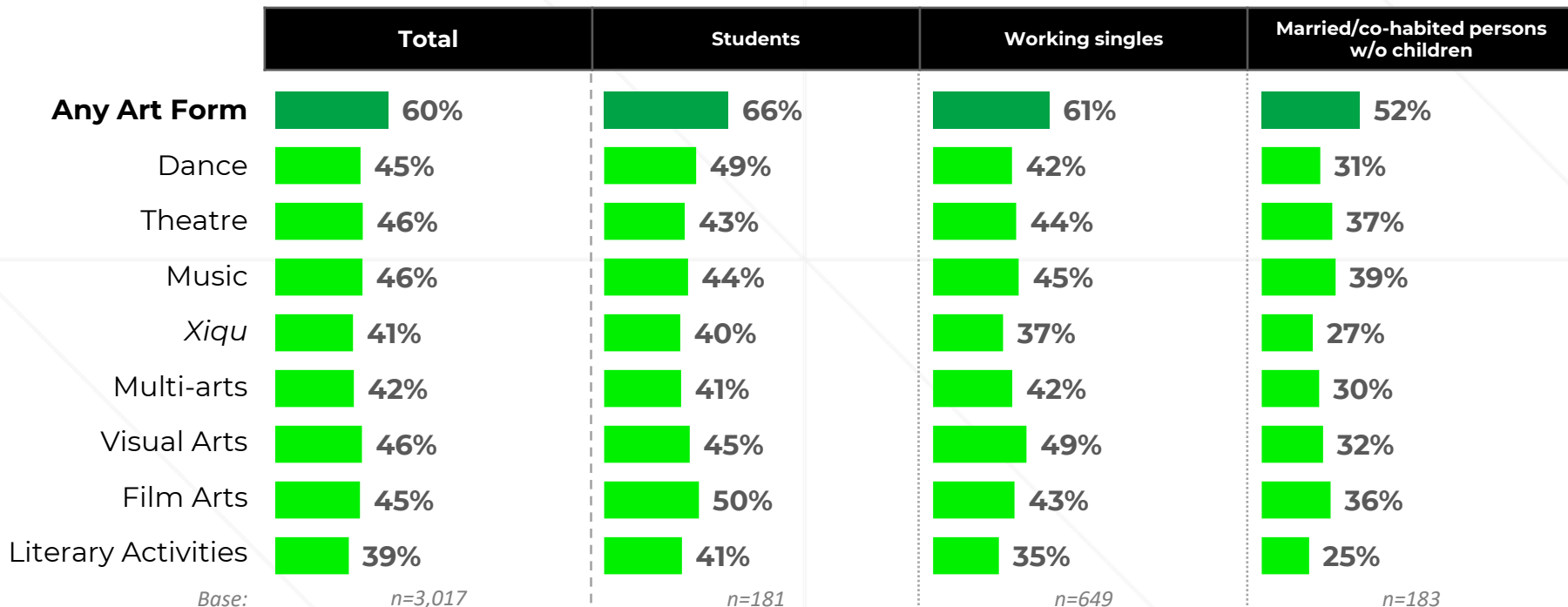
Source: Q203

Base: Participants of each respective art form

Underlined figures denote the top three arts-tech for each art form.

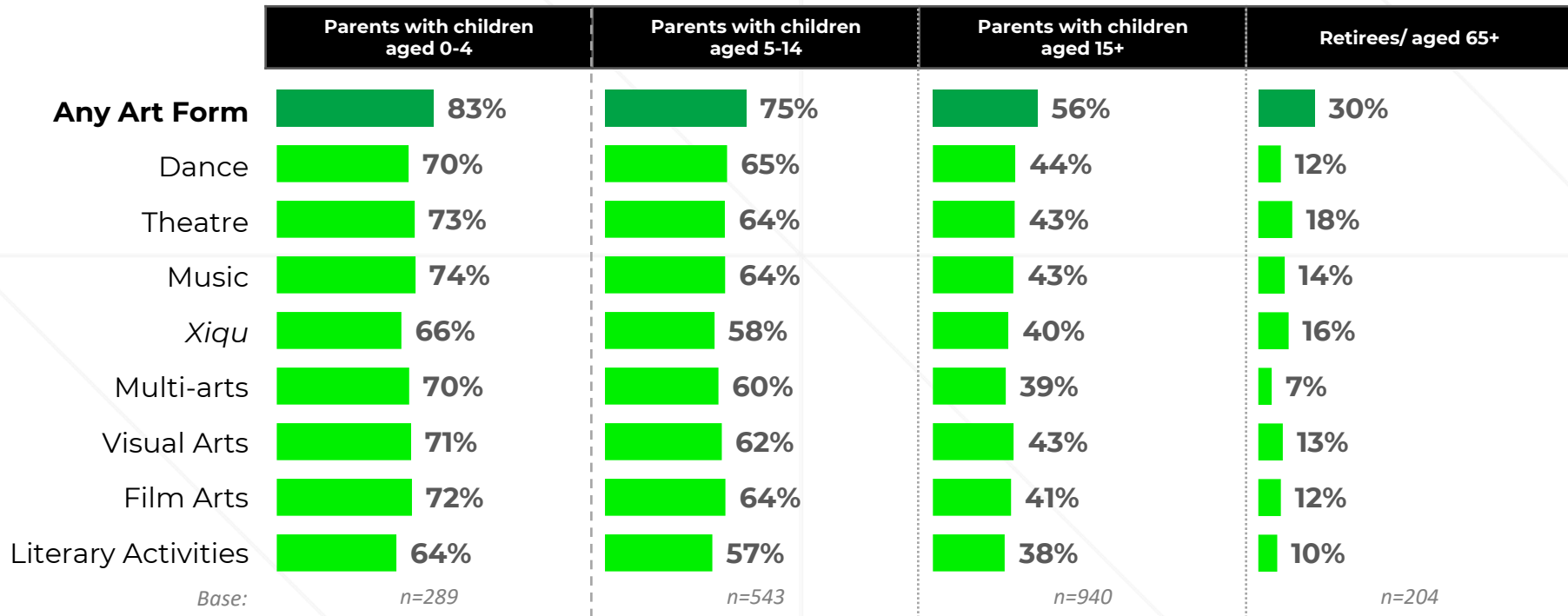
Claimed incidence of experiencing arts-tech (any mode) – by life segment (1)

- Comparatively, Married/co-habited persons without children had less experience of art-tech.



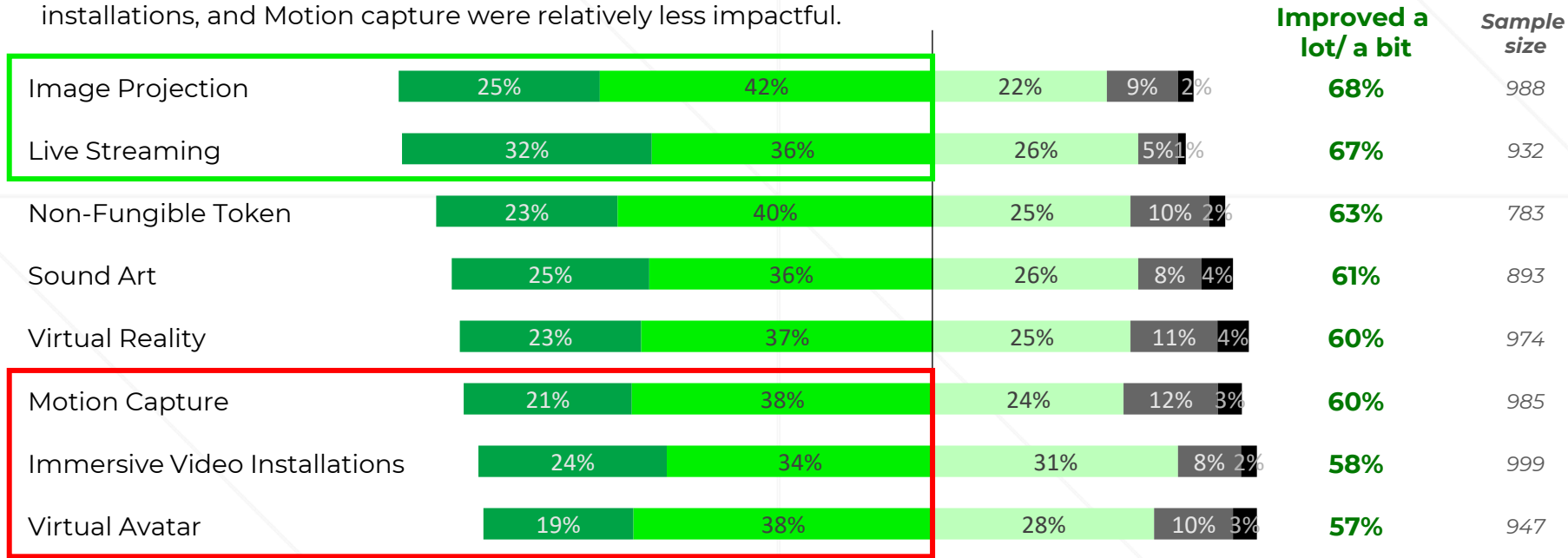
Claimed incidence of experiencing arts-tech (any mode) – by life segment (2)

- More parents with younger children aged 0-14 experienced activities with art-tech, mainly in Dance, Theatre, and Music.



Impact of arts-tech on participants' arts experience

- Arts-tech also managed to improve the experience of the majority of respondents who had experienced arts-tech. In particular, Image projection, and especially Live streaming, had the largest positive impacts. Given that these were the 2 most common forms of arts-tech in Dance activities, this was possibly one of the factors that bolstered the rise in popularity of Dance activities in recent years.
- On the other hand, while most forms of arts-tech were appreciated in general, Virtual avatars, Immersive video installations, and Motion capture were relatively less impactful.



Source: Q204a

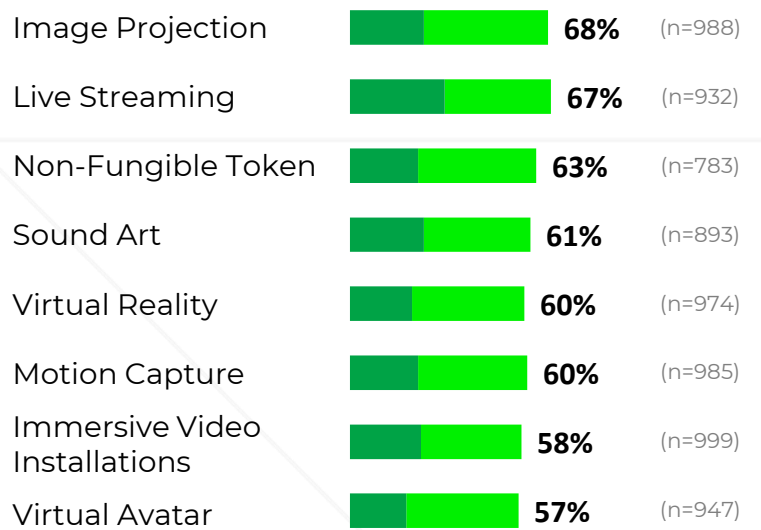
Base: Participants of each respective form of arts-tech

Remark: Above figures do not include those who responded 'No opinion'

Impact of arts-tech on participants' arts experience – by gender and age

- In fact, Image projection and Live streaming elements were the most impactful forms of arts-tech across the majority of segments.
- Relatively more of those aged 55-64 felt that Motion capture and Sound art positively impacted their experience.

■ Improved a lot ■ Improved a bit



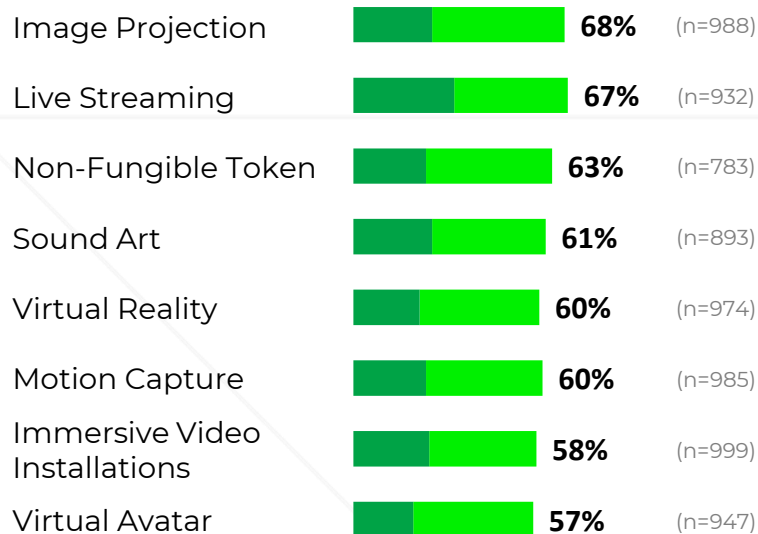
	Male	Female	15-24	25-34	35-44	45-54	55-64	65-74
Image Projection	69%	67%	69%	61%	67%	70%	75%	71%
Live Streaming	70%	65%	69%	71%	69%	68%	55%	58%
Non-Fungible Token	64%	62%	57%	59%	64%	69%	64%	57%
Sound Art	60%	62%	57%	60%	59%	63%	71%	50%
Virtual Reality	66%	55%	56%	60%	59%	64%	59%	53%
Motion Capture	60%	59%	63%	55%	56%	58%	75%	65%
Immersive Video Installations	61%	55%	59%	60%	56%	59%	49%	63%
Virtual Avatar	58%	57%	53%	61%	50%	60%	66%	54%

Source: Q204a
 Figures in grey denotes small base (n<30)
 Base: Participants of each respective form of arts-tech
 Green/Red indicates subgroup figures that are significantly higher/lower than the total results for all respondents at 95% CI.

Impact of arts-tech on participants' arts experience – by life segment

- By life segment, relatively more Married persons without children had their arts experience positively impacted by Sound art and Image projection. In contrast, Motion capture and Virtual avatars were enjoyed more by Parents with children aged 15+ compared to younger parents.

■ Improved a lot ■ Improved a bit



	Students	Working singles	Married/co-habited persons w/o children	Parents with children aged 0-4	Parents with children aged 5-14	Parents with children aged 15+	Retirees/aged 65+
Image Projection	65%	63%	75%	64%	67%	70%	91%
Live Streaming	67%	71%	65%	71%	64%	67%	68%
Non-Fungible Token	51%	62%	70%	62%	58%	67%	71%
Sound Art	54%	57%	76%	58%	59%	65%	41%
Virtual Reality	57%	54%	56%	64%	59%	63%	60%
Motion Capture	60%	60%	70%	56%	53%	64%	52%
Immersive Video Installations	58%	58%	58%	61%	52%	61%	40%
Virtual Avatar	49%	56%	55%	62%	50%	62%	52%

Source: Q204a

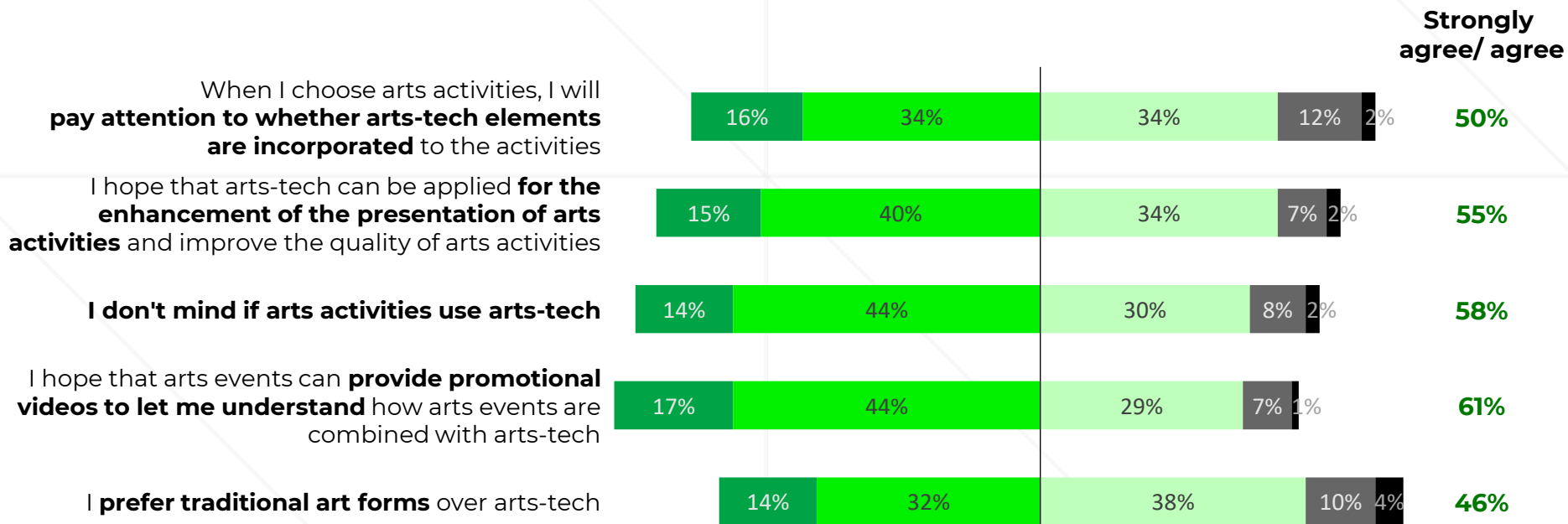
Figures in grey denotes small base (n<30)

Base: Participants of each respective form of arts-tech

Green/Red indicates subgroup figures that are significantly higher/lower than the total results for all respondents at 95% CI.

Attitudes towards arts-tech

- Likely because arts-tech positively impacted peoples' arts experience so far, relatively few mentioned they preferred traditional arts over arts-tech.
- Instead, a relatively large proportion of respondents hoped that art events could provide promotional videos to let them understand how arts events are combined with arts-tech.



Source: Q205
 Base: All respondents (n=3,017)
 Remark: Above figures do not include those who responded 'Don't know'

■ Strongly agree ■ Agree ■ Neutral ■ Disagree ■ Strongly disagree

Attitudes towards arts-tech – by type of participant

- In fact, past participants of arts-tech were much more likely to pay attention to whether arts-tech elements were incorporated before choosing an art activity, further highlighting that arts-tech improved their art experience to the point that they would like to repeat the experience.
- Promotional videos would likely be crucial to help invite the attention of the inexperienced and help them realise the impact of arts-tech.

Respondents that agree/strongly agree with...

When I choose arts activities, I will **pay attention to whether arts-tech elements are incorporated** to the activities

Strongly agree Agree



I hope that arts-tech can be applied **for the enhancement of the presentation of arts activities** and improve the quality of arts activities



I don't mind if arts activities use arts-tech



I hope that arts events can **provide promotional videos to let me understand** how arts events are combined with arts-tech



I prefer traditional art forms over arts-tech



	Arts participants	Arts-tech awarers	Arts-tech participants
When I choose arts activities, I will pay attention to whether arts-tech elements are incorporated to the activities	57%	64%	74%
I hope that arts-tech can be applied for the enhancement of the presentation of arts activities and improve the quality of arts activities	60%	64%	59%
I don't mind if arts activities use arts-tech	61%	63%	63%
I hope that arts events can provide promotional videos to let me understand how arts events are combined with arts-tech	66%	70%	73%
I prefer traditional art forms over arts-tech	50%	49%	60%

2,405

1,834

1,030

Source: Q205

Base: All respondents

Green indicates subgroup figures that are significantly higher than the total results for all respondents at 95% CI.

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Sample size (n=)

3,017

Attitudes towards arts-tech – by life segment

- By life segment, Students and Parents with younger children aged 0-14 were more interested in understanding how arts events were combined with arts-tech and were much more likely to pay attention to whether they were incorporated into arts activities. On the other hand, Parents with older children aged 15+, Working singles and those Married without children also wanted to understand arts-tech more, but they were not as likely to pay specific attention to it.

Respondents that agree/strongly agree with...

■ Strongly agree ■ Agree

When I choose arts activities, I will **pay attention to whether arts-tech elements are incorporated** to the activities **50%**



I hope that arts-tech can be applied **for the enhancement of the presentation of arts activities** and improve the quality of arts activities **55%**



I don't mind if arts activities use arts-tech **58%**



I hope that arts events can **provide promotional videos to let me understand** how arts events are combined with arts-tech **61%**



I prefer traditional art forms over arts-tech **46%**



	Students	Working singles	Married/co-habited persons w/o children	Parents with children aged 0-4	Parents with children aged 5-14	Parents with children aged 15+	Retirees/aged 65+
When I choose arts activities, I will pay attention to whether arts-tech elements are incorporated to the activities	63%	48%	44%	62%	61%	48%	29%
I hope that arts-tech can be applied for the enhancement of the presentation of arts activities and improve the quality of arts activities	62%	58%	51%	56%	56%	55%	49%
I don't mind if arts activities use arts-tech	64%	58%	60%	53%	57%	60%	55%
I hope that arts events can provide promotional videos to let me understand how arts events are combined with arts-tech	66%	62%	60%	67%	63%	60%	59%
I prefer traditional art forms over arts-tech	42%	38%	41%	52%	53%	48%	49%

Source: Q205

Base: All respondents

Green/Red indicates subgroup figures that are significantly higher/lower than the total results for all respondents at 95% CI.

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Sample size (n=) 3,017

181 649 183 289 543 940 204

Attitudes towards arts-tech – by gender and age

- Younger audiences aged 15-24 were typically more interested in arts-tech and were substantially more likely to pay attention to whether it was included in arts activities.
- Compared to consumers aged 15-24, consumers aged 25-54 also appeared to be intrigued to learn more about arts-tech but seemed to pay less attention to and care less about whether arts-tech was used in arts activities.

Respondents that agree/strongly agree with...

■ Strongly agree ■ Agree

When I choose arts activities, I will **pay attention to whether arts-tech elements are incorporated** to the activities **50%**

I hope that arts-tech can be applied **for the enhancement of the presentation of arts activities** and improve the quality of arts activities **55%**

I don't mind if arts activities use arts-tech **58%**

I hope that arts events can **provide promotional videos to let me understand** how arts events are combined with arts-tech **61%**

I prefer traditional art forms over arts-tech **46%**

	Male	Female	15-24	25-34	35-44	45-54	55-64	65-74
When I choose arts activities, I will pay attention to whether arts-tech elements are incorporated to the activities	51%	49%	70%	53%	57%	59%	36%	32%
I hope that arts-tech can be applied for the enhancement of the presentation of arts activities and improve the quality of arts activities	57%	54%	65%	58%	55%	58%	51%	48%
I don't mind if arts activities use arts-tech	58%	59%	66%	56%	55%	60%	58%	59%
I hope that arts events can provide promotional videos to let me understand how arts events are combined with arts-tech	63%	61%	69%	66%	60%	68%	54%	57%
I prefer traditional art forms over arts-tech	48%	45%	46%	40%	45%	51%	44%	52%

Source: Q205

Base: All respondents

Green/Red indicates subgroup figures that are significantly higher/lower than the total results for all respondents at 95% CI.

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Sample size (n=) 3,017

1,355 1,662

363

548

673

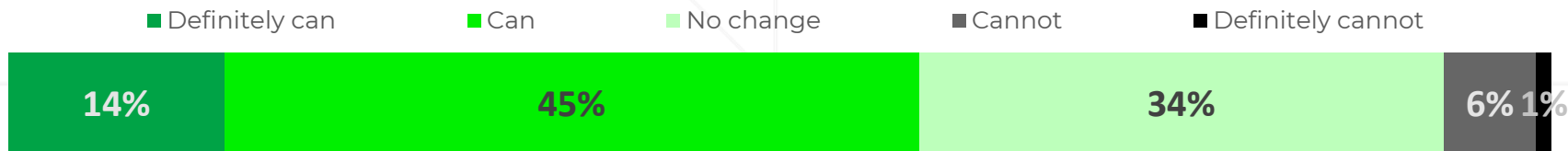
667

469

297

Likelihood for arts-tech to increase interest in arts participation (any mode) in the future

- As such, due to the relatively positive reception of arts-tech so far, nearly three-fifths of respondents mentioned they were more interested in participating in arts activities due to arts-tech.
- However, those who expressed that arts-tech would increase their desire for arts participation mainly were made up of existing arts participants.



3,488,520
Projected population interested in arts-tech

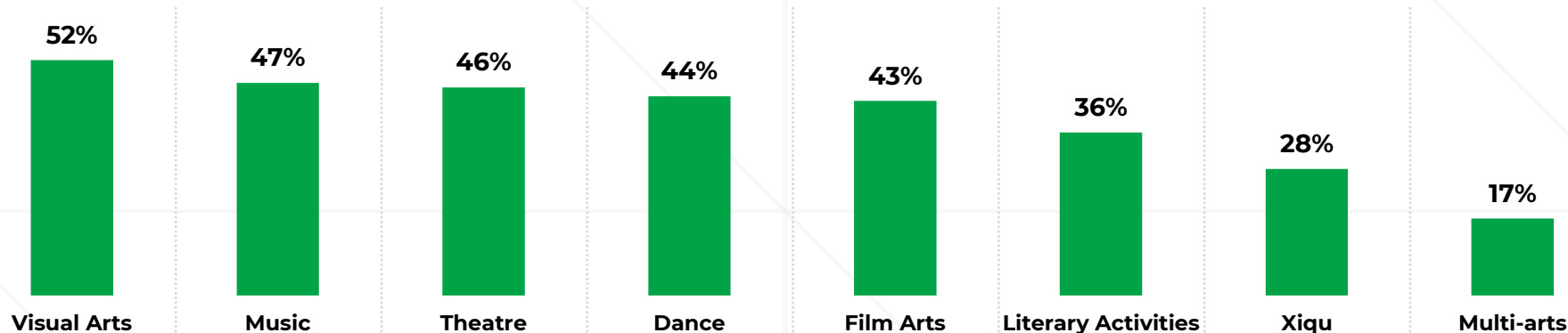
- 67%** Participants
- 32%** Non-participants

Source: Q206. How much do you think arts-tech can increase your desire to participate in arts activities?
Base: All respondents (n=3,017)

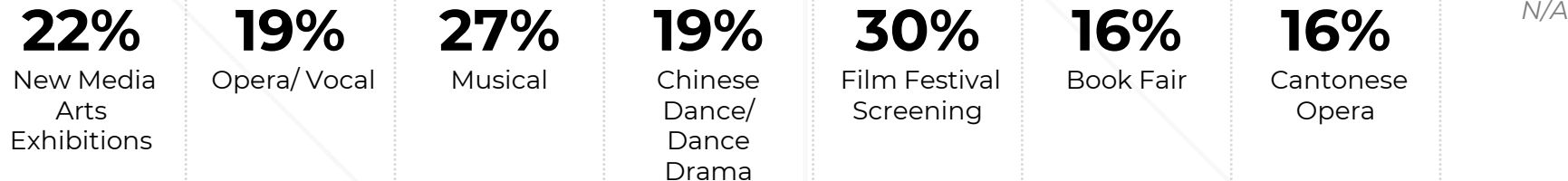
Incidence of rising participation interest (any mode) due to arts-tech – by art form and genre

(among those who would be more driven to participate in arts due to arts-tech)

- Consumers were interested in viewing arts-tech in a wide range of art forms – arts-tech in Visual Arts, Music, Theatre, Dance and Film Arts activities would be appreciated by most. In particular, Film Festival Screenings, Musicals and New Media Arts Exhibitions captured the most interest.



Top genre for each respective art form



Source: Q207

Base: Those who would be more driven to participate in arts due to arts-tech (n=1859; projected population of 3,488,520)

Projected population of existing, potential and arts-tech driven participants

- In fact, since most of those interested in arts-tech were already interested in arts activities in the first place, it was expected that arts-tech independently would only generate 150k new arts participants, accounting for less than 5% of the total projected population.

4,580,858 (85%)

**Existing participants
(any mode)
(from July 2021 to July 2022)**

668,293 (12%)

**Potential participants@
(physical mode)
(In the next 12 months)**

151,637 (3%)

**Participants solely
driven by arts-tech^
(any mode)**

5,400,788

**Projected population interested in arts
participation in any mode**

Source: Q101, Q111, Q206

Base: All respondents (n=3,017)

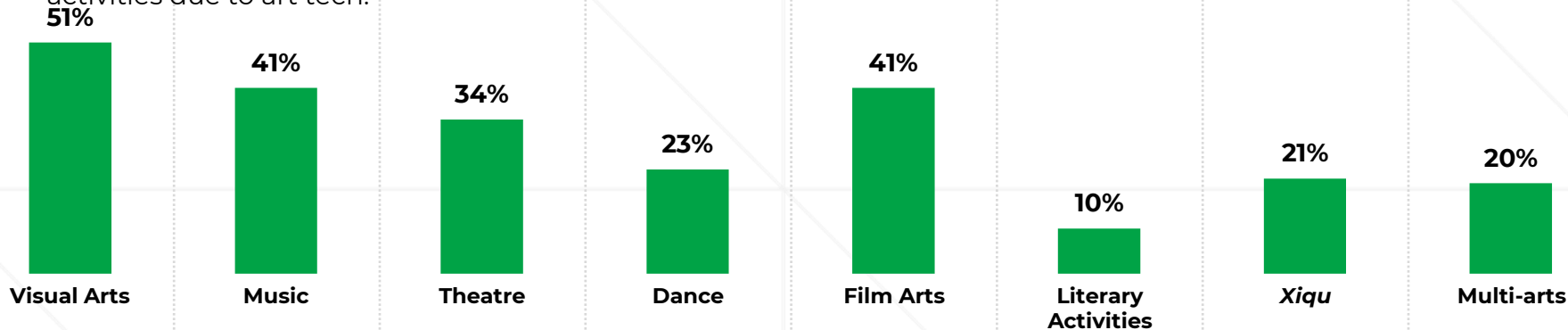
@The projected no. of potential participants is based on the proportion of respondents who claimed that they did not participate in any arts programmes from July 2021 to July 2022, but would be interested in doing so in the 12 months after.

^The projected no. of participants solely driven by arts-tech is based on the proportion of respondents who claimed that they did not participate in any arts programmes from July 2021 to July 2022, and are not interested in doing so in the 12 months after, but would be interested in participating in them due to arts-tech.

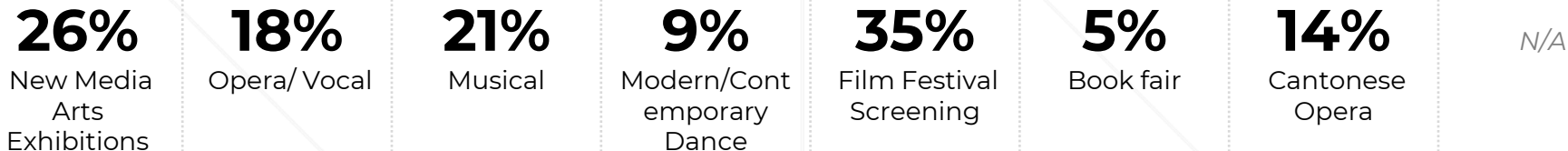
Incidence of rising participation interest (any mode) due to arts-tech – by art form and genre

(among participants solely driven by arts-tech)

- Among those 150k new arts-tech driven participants, they would most likely be driven to sign up for Visual Arts, Music and Film Arts activities. Specifically, Film Festival Screenings, New Media Arts Exhibitions, Musicals and Operas could incorporate arts-tech elements to gain a larger audience.
- In contrast, they would be substantially less likely to participate in Literary Activities, Multi-arts, *Xiqu* and Dance activities due to art tech.



Top genre for each respective art form



Source: Q207

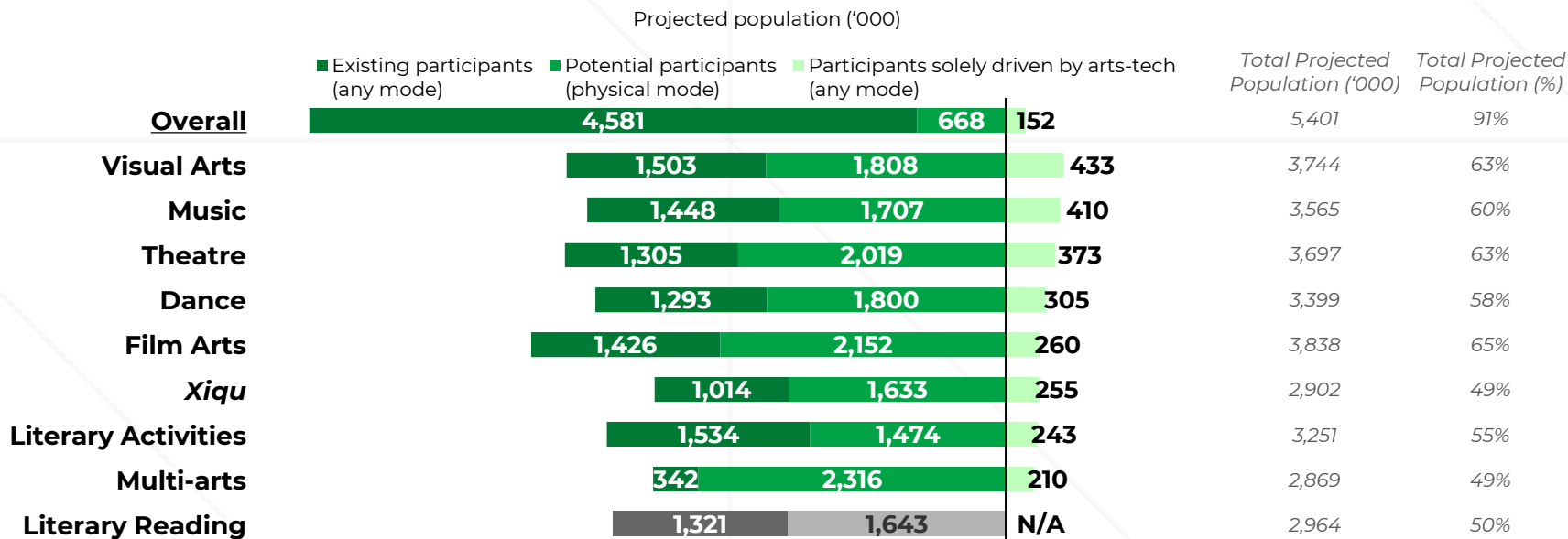
Base: Participants solely driven by arts-tech (n=73; projected population of 151,637)

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Projected population of existing, potential and arts-tech driven participants

– by art form[^]

- However, arts-tech was able to drive varying levels of participation within each art form, ranging from 210k to 433k new participants. In fact, arts-tech was reportedly able to introduce relatively more new participants to Visual Arts, Music and Theatre, likely those who were participants of other art forms that weren't originally intending to participate in Visual Arts/ Music/ Theatre.
- As such, although arts-tech could only introduce a few new art participants, it appeared to attract them to participate in other art forms they were not originally interested in.



Source: Q101, Q111, Q206, Q207

Base: All respondents (n=3,017)

[^]Remark: overlap exists between art form participants (i.e. a single respondent can be an existing/ potential/ arts-tech driven participant for multiple art forms)

N/A: Arts-tech not applicable to Literary Reading

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Attractiveness of different selling points for arts activities - by art form

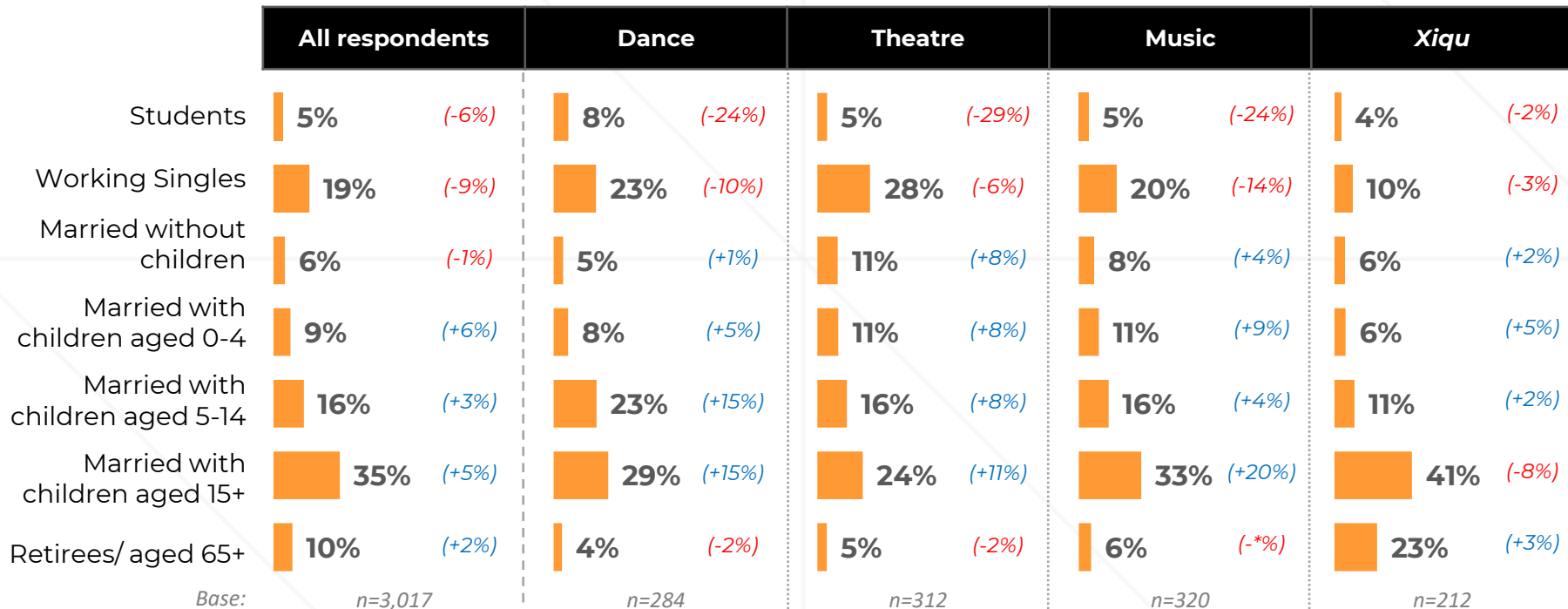
- However, as a whole, arts-tech was relatively less attractive in the face of other content-related categories. Instead, more respondents generally considered classic works and inspirational/ reflective topics more important for arts participation.
- Furthermore, being locally/ internationally renowned was also a key factor of consideration for potential participants.

	Dance	Theatre	Music	Xiqu	Multi-Arts	Visual Arts	Film Arts	Literary Reading	Literary Activities
Classic works	<u>34%</u>	<u>38%</u>	<u>34%</u>	<u>42%</u>	25%	27%	<u>34%</u>	<u>41%</u>	<u>34%</u>
Internationally renowned creators/ performers/ groups	<u>32%</u>	25%	<u>30%</u>	23%	26%	<u>28%</u>	25%	23%	24%
Locally renowned creators or performers/groups	<u>30%</u>	<u>30%</u>	<u>30%</u>	<u>30%</u>	<u>27%</u>	24%	28%	28%	27%
Inspirational/Reflective Topics	<u>30%</u>	<u>30%</u>	25%	24%	<u>30%</u>	<u>31%</u>	<u>32%</u>	<u>38%</u>	<u>33%</u>
Award-winning/ Reenactment Works	29%	<u>30%</u>	<u>31%</u>	<u>26%</u>	<u>27%</u>	<u>29%</u>	<u>35%</u>	<u>35%</u>	<u>30%</u>
Arts-tech	9%	8%	9%	6%	13%	12%	7%	N/A	N/A
Sample size (n=)	2,398	2,493	2,444	2,131	2,372	2,482	2,551	2,354	2,326

Source: Q208

Base: Those who are interested in participating in each respective art form
Underlined figures indicates top three factors for each art form.

Appendix I: Demographic overview of all respondents vs. art form participants (physical mode) – 2021/22 vs. 2014/15 (1)



Source: Q304, Q305, Q306
 () denotes gap vs. 2014/15 results
 Base: All respondents

Appendix I: Demographic overview of all respondents vs. art form participants (physical mode) – 2021/22 vs. 2014/15 (2)

	Multi-arts	Visual Arts	Film Arts	Literary Reading	Literary Activities
Students	5% (-21%)	5% (-21%)	5% (-20%)	6% (NA)	5% (NA)
Working Singles	25% (-19%)	25% (-19%)	24% (-19%)	20% (NA)	23% (NA)
Married without children	9% (+5%)	7% (+3%)	7% (+1%)	7% (NA)	7% (NA)
Married with children aged 0-4	15% (+12%)	13% (+9%)	13% (+10%)	11% (NA)	7% (NA)
Married with children aged 5-14	13% (+3%)	17% (+8%)	15% (+8%)	18% (NA)	19% (NA)
Married with children aged 15+	29% (+17%)	26% (+17%)	29% (+20%)	32% (NA)	31% (NA)
Retirees/ aged 65+	1% (+*%)	6% (+2%)	5% (-*%)	5% (NA)	7% (NA)
Base:	n=87	n=475	n=415	n=581	n=470

Source: Q304, Q305, Q306

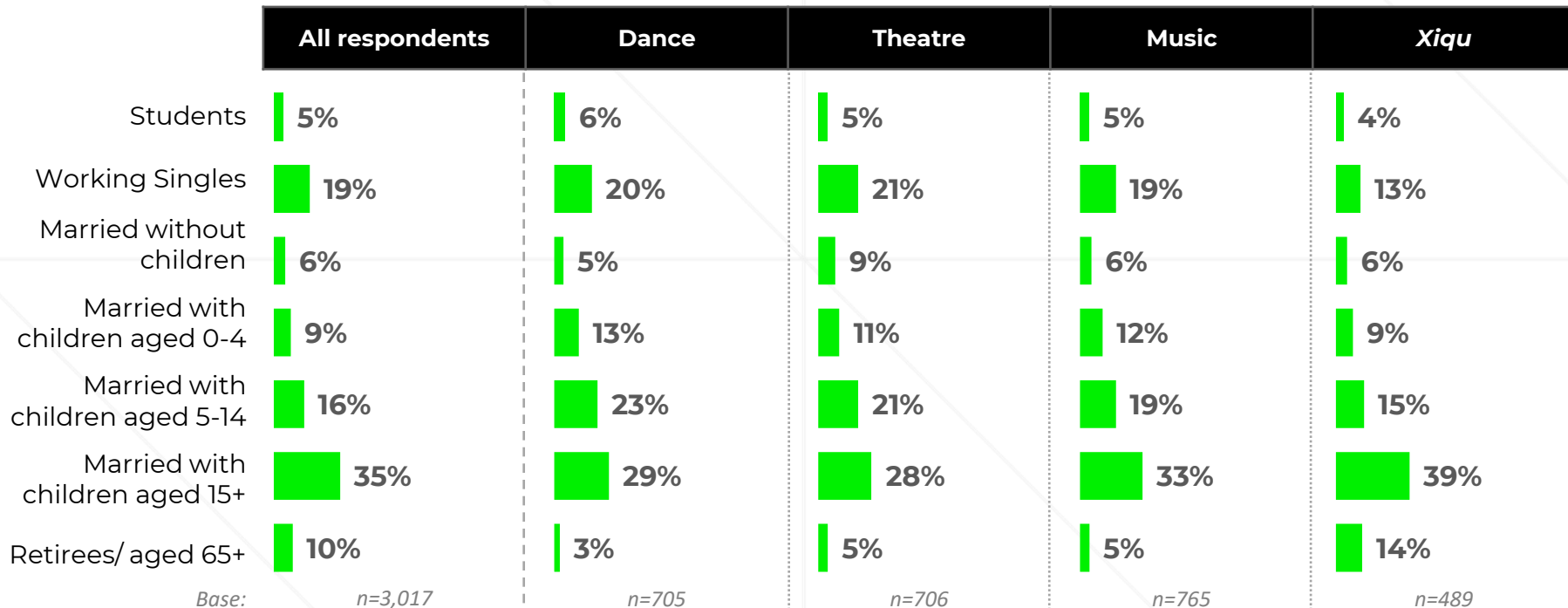
(-) denotes gap vs. 2014/15 results

Remark: 2014/15's Literary Reading/Activities results are not suitable for comparisons due to different question setting as explained on slide 8

Base: All respondents

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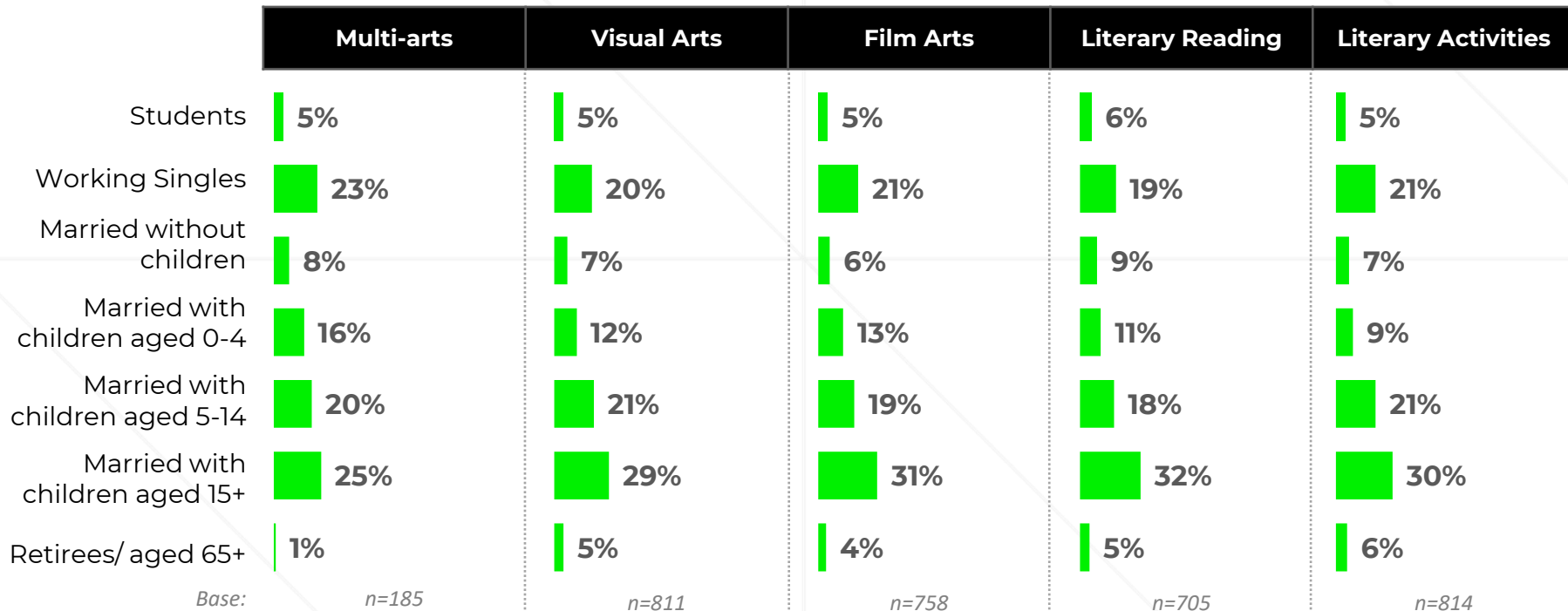
Appendix II: Demographic overview of all respondents vs. art form participants (any mode) – 2021/22 (1)



Source: Q304, Q305, Q306
Base: All respondents

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Appendix II: Demographic overview of all respondents vs. art form participants (any mode) – 2021/22 (2)



Source: Q304, Q305, Q306
Base: All respondents

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