

# Individual Art Form Analysis - Film and Media Arts

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# Key highlights

- Participation in Film and Media Arts dropped from 45% in 2018-2019 to 35% during COVID-19, but there was still nearly a quarter of respondents who had participated in the art form in all time periods. Young adults aged 25-34 and married persons having children under 18 were especially active in Film and Media Arts participation.
- Over 40% of lapsed participants had only participated in physical-mode programmes in 2018-2019. The lower availability of physical programmes during COVID-19 might be a reason why they ceased participation.
- Participation share in alternative modes grew from 72% in 2018-2019 to 93% during COVID-19, with social media platforms (52%), TV/ radio broadcast (43%) and paid video-on-demand platforms (40%) being the most popular channels. Compared to physical-mode participation before the epidemic, alternative-mode participation in Film and Media Arts during COVID-19 was notably more frequent and involved more free programmes and slightly more local productions.
- 75% of respondents expressed interest in future Film and Media Arts programmes. The percentages of those with interest in physical-mode participation (45%) and in alternative-mode participation (42%) were similar.
- Potential Film and Media Arts participants shared a similar profile as those actual participants in past 3 years. They were skewed towards 25-34 years old and married persons having children under 18. They tended to have higher education level and household income.
- Among the potential participants, over 20% had participated stably before 2018 and continued through the COVID-19 outbreak. While these stable retaining participants would be more likely to consider alternative modes only when physical participation was not possible, they were willing to pay more for alternative-mode Film and Media Arts programmes than all potential participants.
- Nearly 60% of potential participants were lapsed participants or non-participants. They attributed their non-participation in Film and Media Arts programmes in 2018-2019 and during COVID-19 mainly to not receiving information on these programmes. Further efforts should be made to connect and deliver programme information to these potential participants, for example through social media platforms, ads on mobile apps or websites, and emails.

# Segment of arts participation - definition

Based on their participation history, arts participants could be grouped into different segments to provide further insight on the impact of COVID-19 on the participation in different art forms:

- How many participants lapsed in 2018-2019 have started participating again during COVID-19?
- How many new participants have been drawn in each art form due to COVID-19?
- How many participants have ceased participation in each art form due to COVID-19?

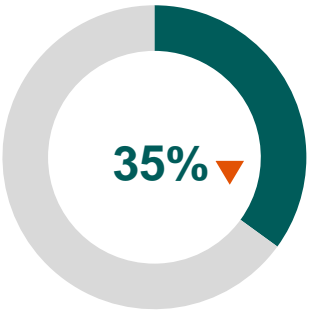
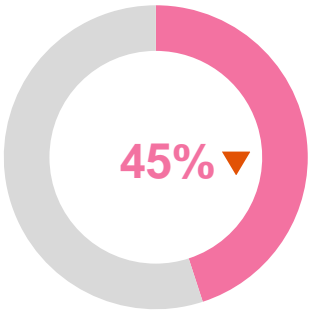
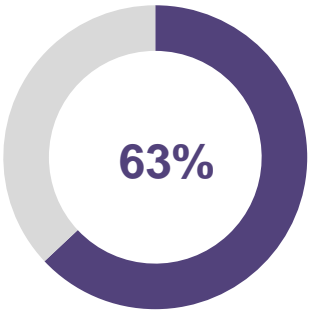
 Ever-Participation	Before 2018	In 2018-2019 (Before COVID-19)	During COVID-19 (Jan 2020 – Jan 2021)
• Retaining participants	✓	✓	✓
• Young participants		✓	✓
• Returning participants	✓		✓
• New participants			✓
• Lapsed participants since COVID-19	✓	✓	
		✓	
• Lapsed participants since 2018	✓		
• Non-participants			

# Arts participation – Film and Media Arts

- Participation in Film and Media Arts dropped from 45% in 2018-2019 to 35% during COVID-19.
- Compared to other art forms, Film and Media Arts had the highest percentage of retaining participants and the lowest percentage of non-participants.



### Participation Incidence



### Projected Population

2,714,146

1,954,983

1,527,332

### Participation Segment

### Projected Population

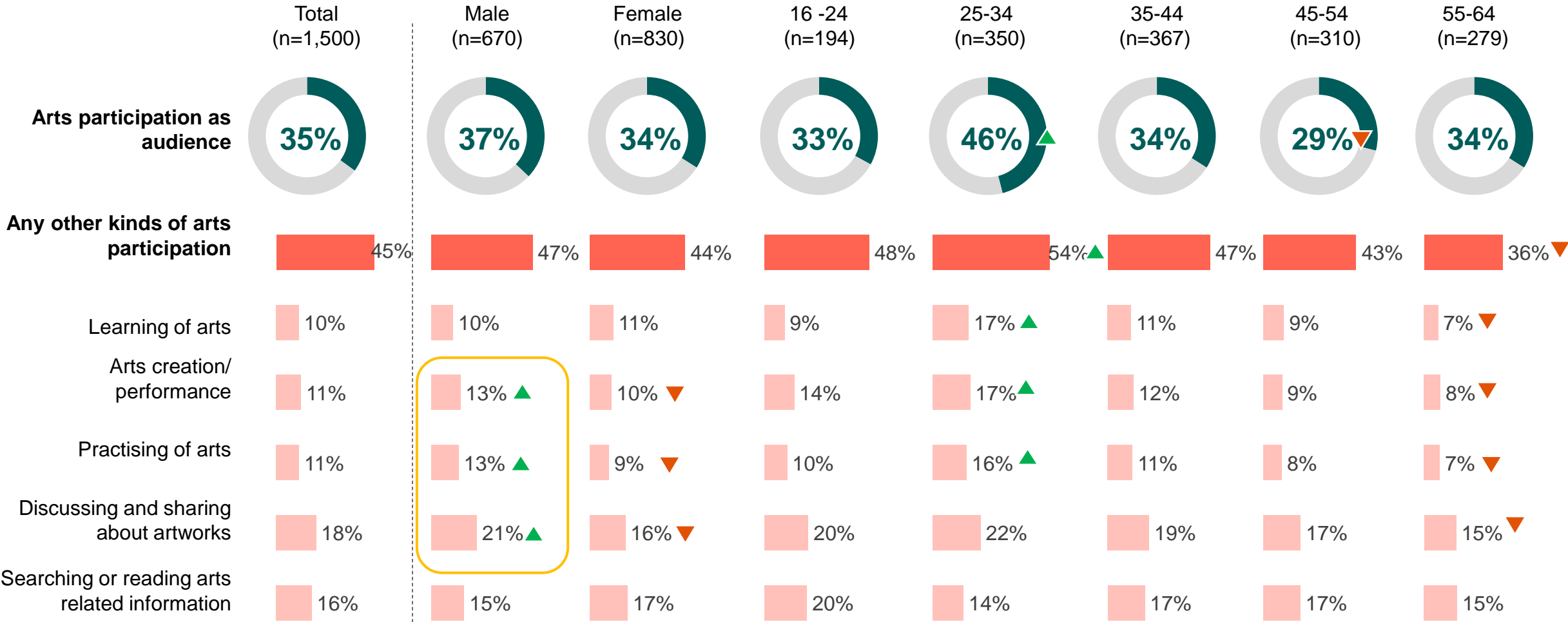
Participation Segment	Percentage	Projected Population
Total (n=1,500)		
Retaining participants	24%	1,040,707
Young participants	5%	195,524
Returning participants	5%	209,107
New participants	2%	81,994
Lapsed participants since COVID-19	17%	718,752
Lapsed participants since 2018	21%	906,314
Non-participants	27%	1,186,714



Base: All respondents, n=1,500  
 ▲ ▼ Denote the incidence is significantly higher/ lower than the previous period

# All kinds of arts participation during COVID-19 – Film and Media Arts – by demographics

- Young adults aged 25-34 were the most active Film and Media Arts participants, both as audience and in other kinds of arts involvement.
- By comparison, male respondents were more likely to participate in the discussion/ sharing, practice and creation/ performance of the art form.



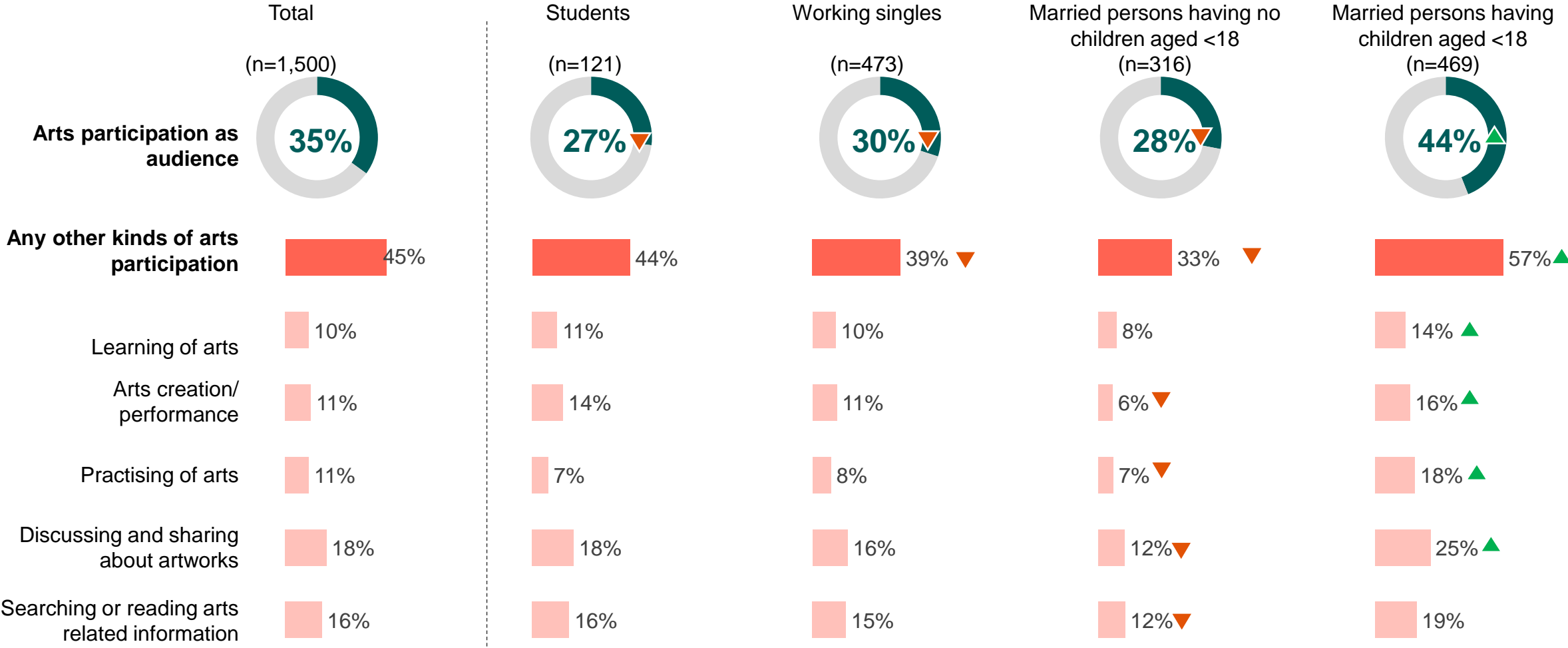
Base: All respondents, n=1,500

▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

# All kinds of arts participation during COVID-19 – Film and Media Arts – by life segments

Note to readers: The segment of retirees is not shown due to small base (n=26)

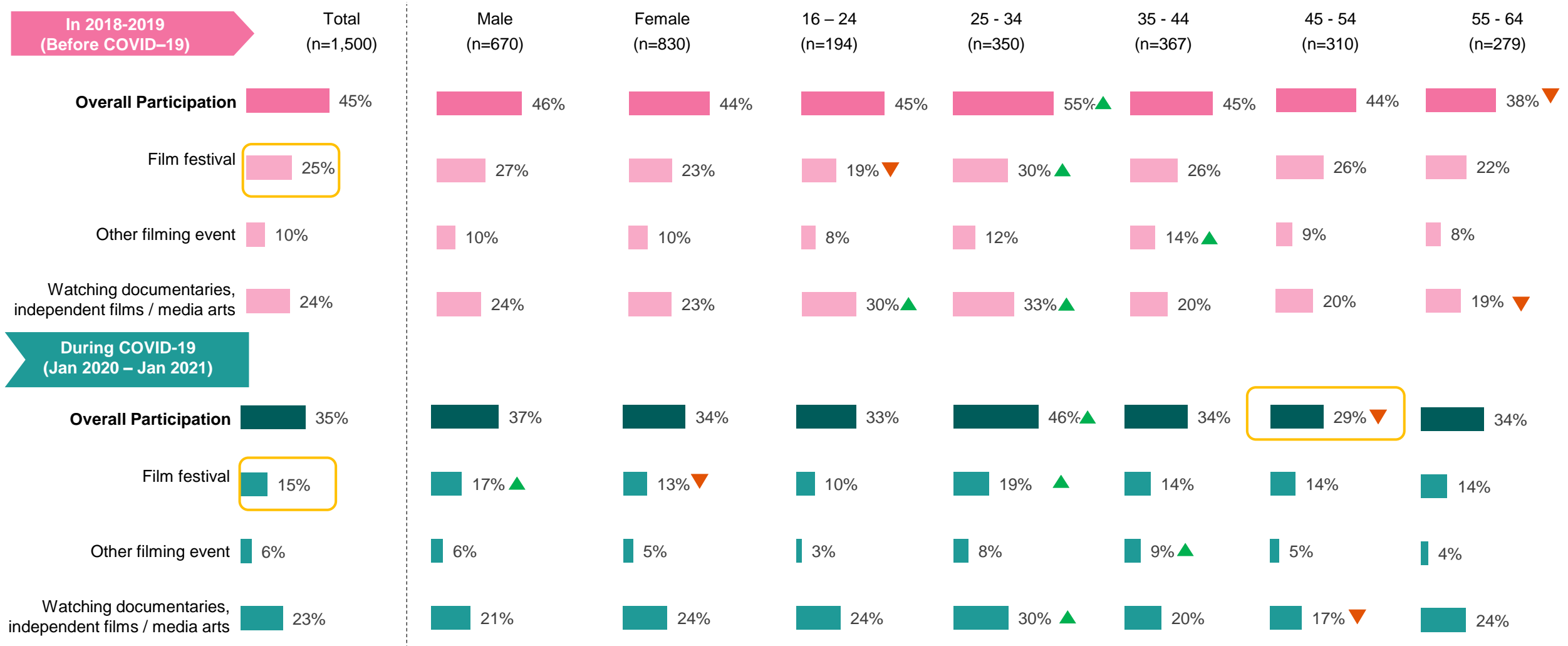
- Married persons having children under the age of 18 were most active participants in Film and Media Arts, whereas all other life segments had significantly less participation as audience during COVID-19.



Base: All respondents, n=1,500  
 ▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

# Participation in Film and Media Arts over time – by demographics

- Participation in film festivals was more affected by COVID-19, with the incidence down by 10 percentage points.
- While all age groups had participated less in Film and Media Arts during the epidemic, the incidence drop was the most prominent among those aged 45-54.



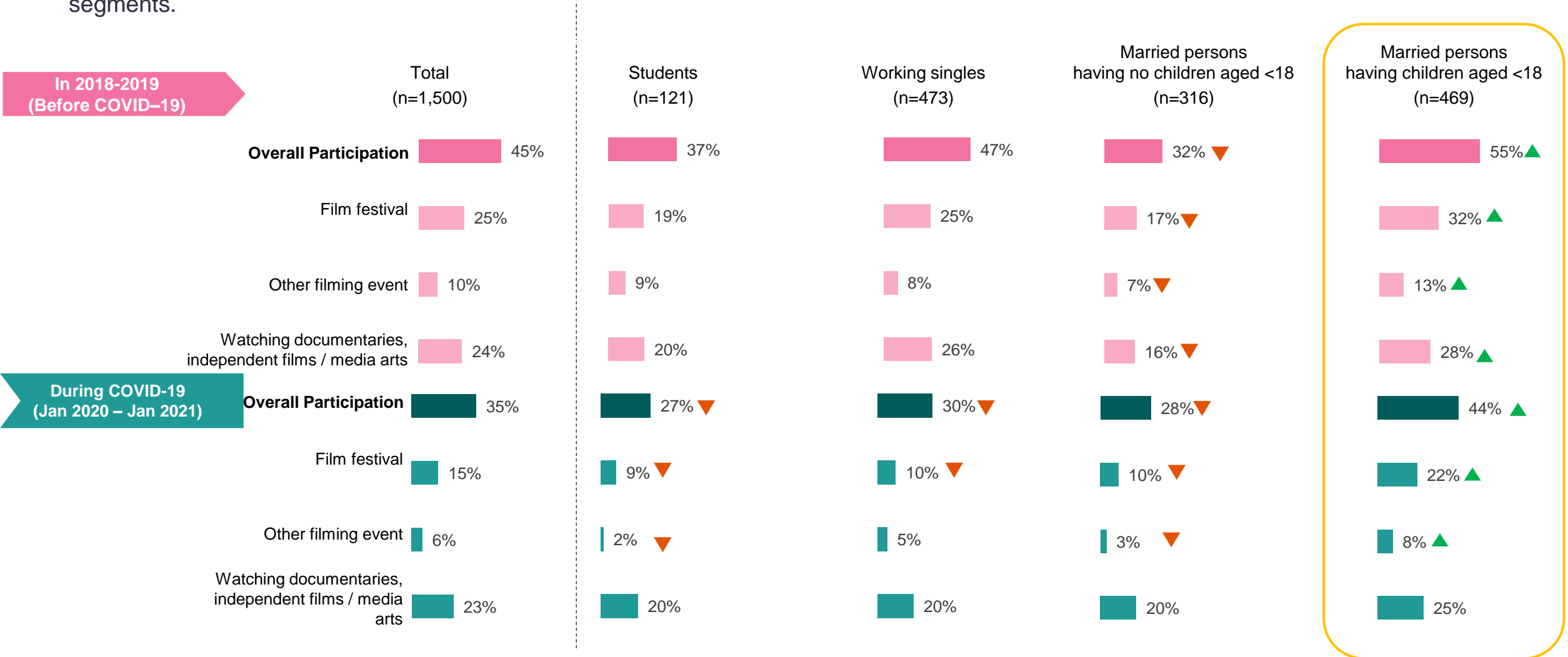
Base: All respondents, n=1,500

▲▼ Denote the figure of the segment is significantly higher/ lower than the total

# Participation in Film and Media Arts over time – by life segments

Note to readers: The segment of retirees is not shown due to small base (n=26)

- Although the participation rate of married persons having young children had dropped, it was still significantly higher than those of other life segments.

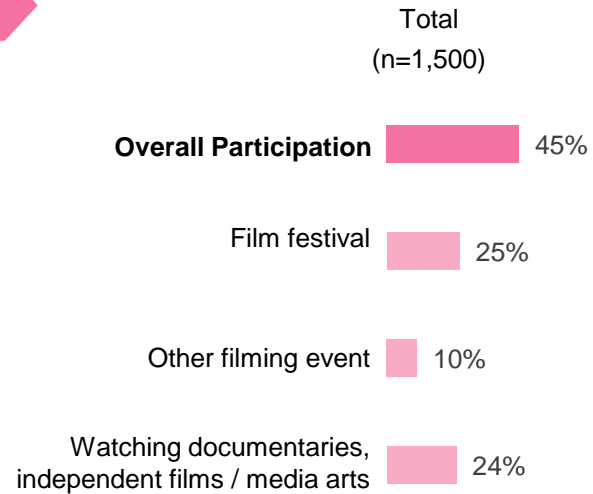




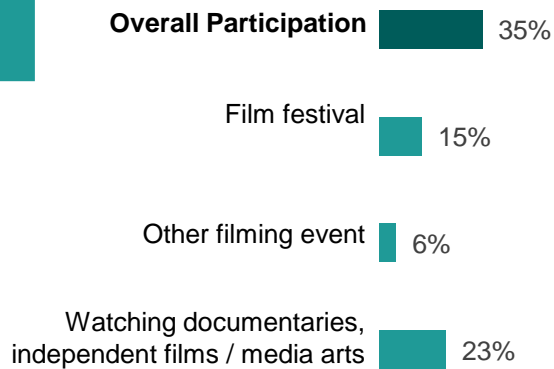
# Participation in Film and Media Arts over time – by life segments

- The higher participation incidence was seen across married persons having young children at different ages.

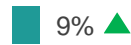
In 2018-2019  
(Before COVID-19)



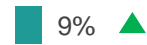
During COVID-19  
(Jan 2020 – Jan 2021)



Married persons  
having children aged 0 – 4  
(n=176)



Married persons  
having children aged 5 – 14  
(n=288)



Married persons  
having children aged 15+  
(n=76)



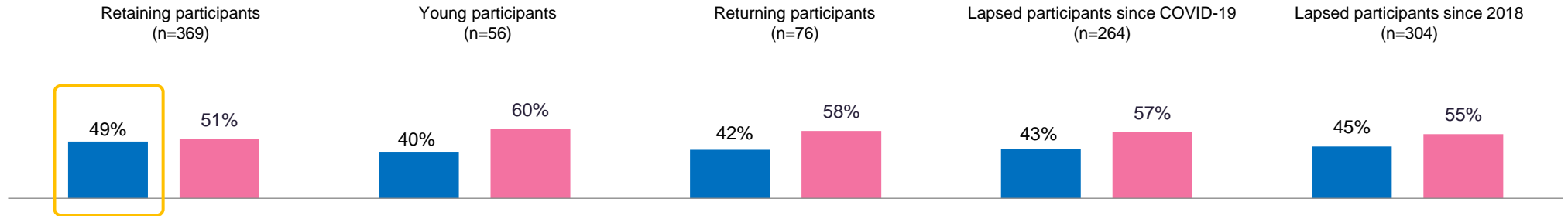
# Profiles of arts participants – Film and Media Arts

Note to readers: The segment of New participants (n=25) is not shown due to small base

- Retaining participants had a relatively higher percentage of male than other participant segments had. (Note: In the overall sample, there was 44% of male respondents and 56% of female)

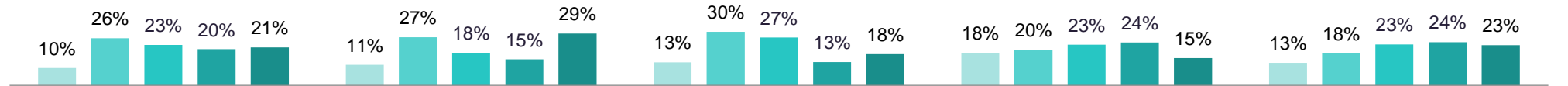
## Gender

Male  
Female



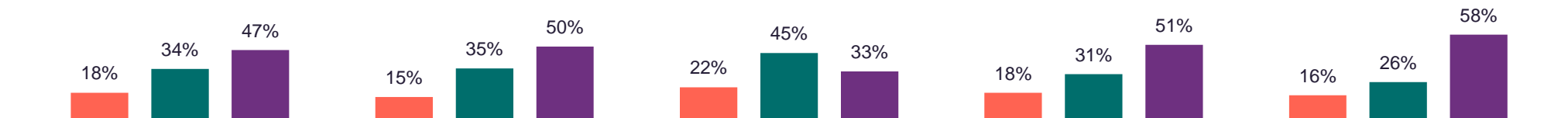
## Age Group

16-24 25-34  
35-44 45-54  
55-64



## Region

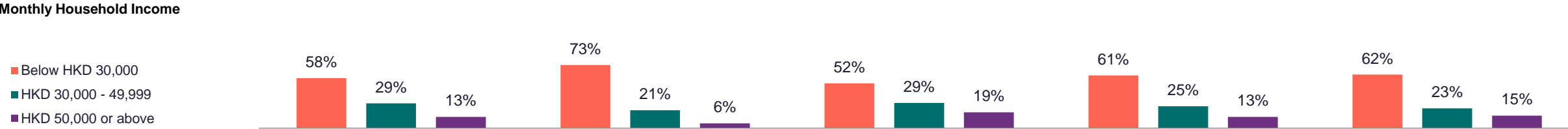
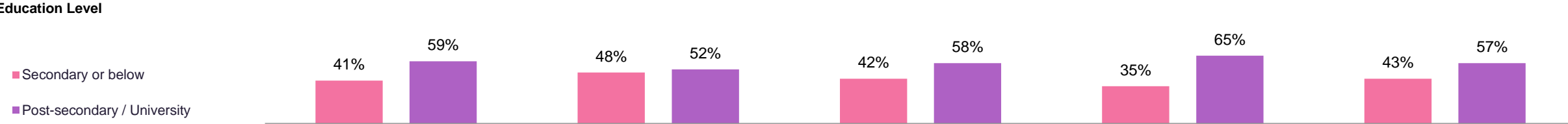
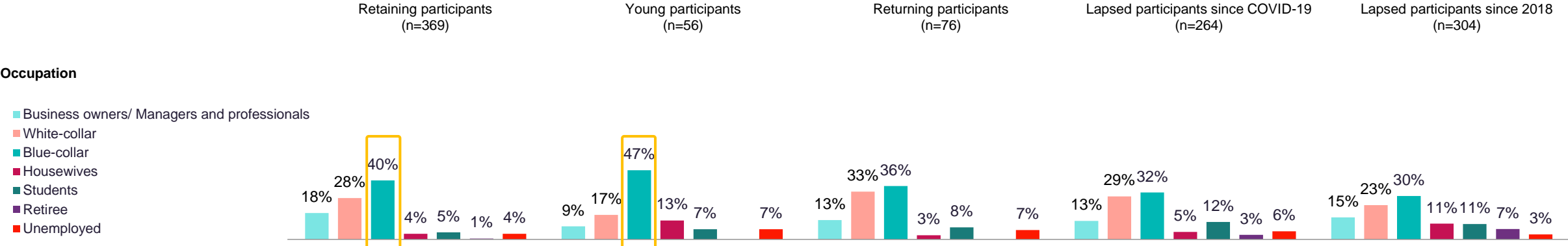
Hong Kong Island  
Kowloon  
New Territories



# Profiles of arts participants – Film and Media Arts

Note to readers: The segment of New participants (n=25) is not shown due to small base

- Retaining and young participants had a relatively higher proportion of blue-collar workers. (Note: In the overall sample, 34% of respondents were blue-collar).

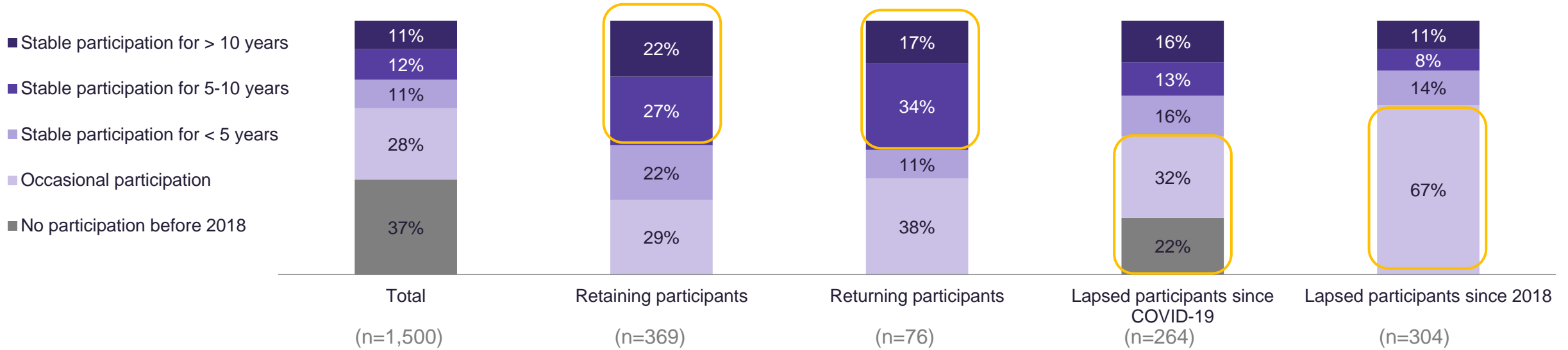


# Arts participation before 2018 – Film and Media Arts

Note to readers: Young participants and New participants are not applicable to this question.

- About half of the retaining participants and returning participants had participated in Film and Media Arts for more than 5 years before 2018, whereas those lapsed participants were more likely to be occasional participants or had no participation before 2018.

## Participation before 2018

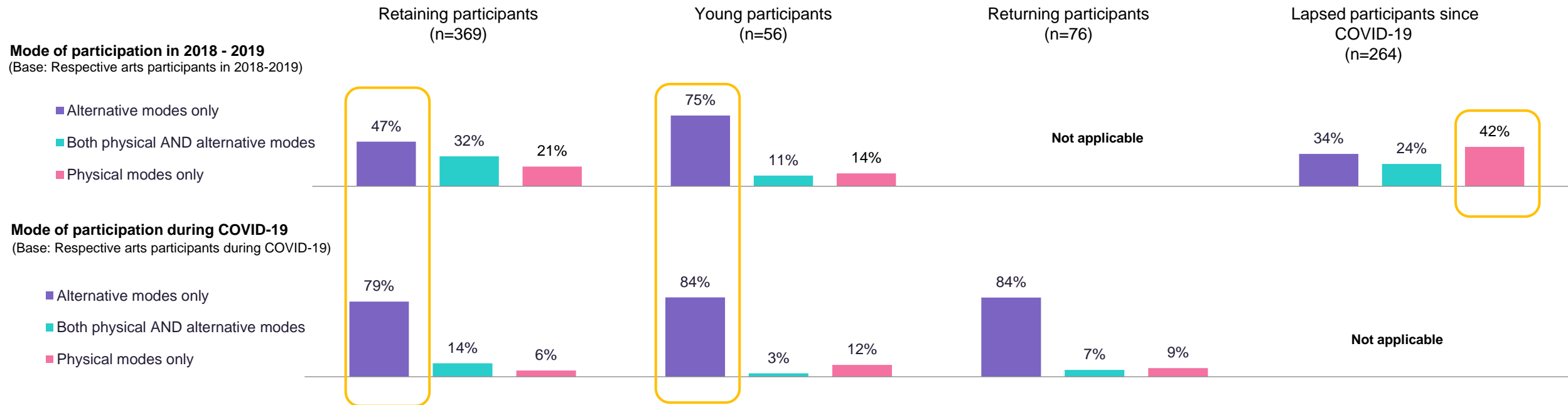


# History of arts participation – Film and Media Arts

Note to readers: Lapsed participants since 2018 have no participation in either 2018-2019 or during COVID-19 and are therefore not shown. Also, the segment of New participants (n=25) is not shown due to small base

- Over 40% of lapsed participants had only participated in physical-mode programmes in 2018-2019. The lower availability of physical programmes during COVID-19 might be a reason why they ceased participation.
- By comparison, more retaining and young participants had adapted to alternative-mode participation even before the COVID-19 outbreak.

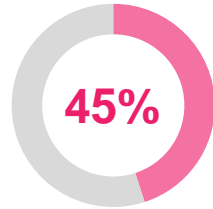
## History of Arts Participation



# Mode of participation among arts participants – Film and Media Arts

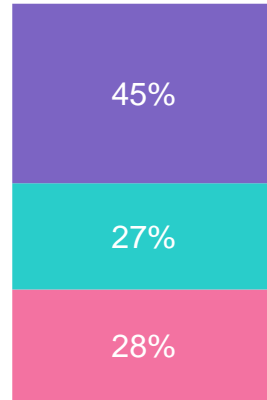
- Participation in alternative modes grew from 72% in 2018-2019 to 93% during COVID-19, while physical participation dropped significantly from 55% to 20%.
- The popularity growth in alternative modes was mainly driven by social media platforms (52%), TV/ radio broadcast (43%), and paid video-on-demand platforms (40%), whereas other alternative channels observed only a mild incidence increase.

## Participation Incidence (n=1,500)

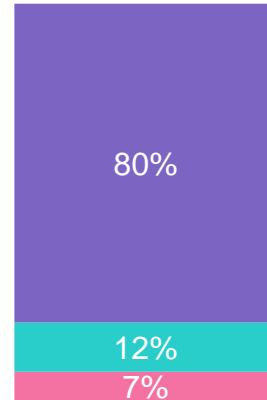
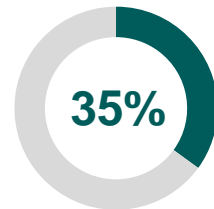


## Mode of participation among participants

- Alternative modes only
- Both physical AND alternative modes
- Physical modes only



In 2018 – 2019  
(n=689)



During COVID-19  
(n=526)

## Projected Population

### Mode of Participation

Mode of Participation	In 2018 – 2019 (n=689)	During COVID-19 (n=526)
Alternative modes only	885,676	1,228,036
Both physical AND alternative modes	523,068	189,054
Physical modes only	546,239	110,242

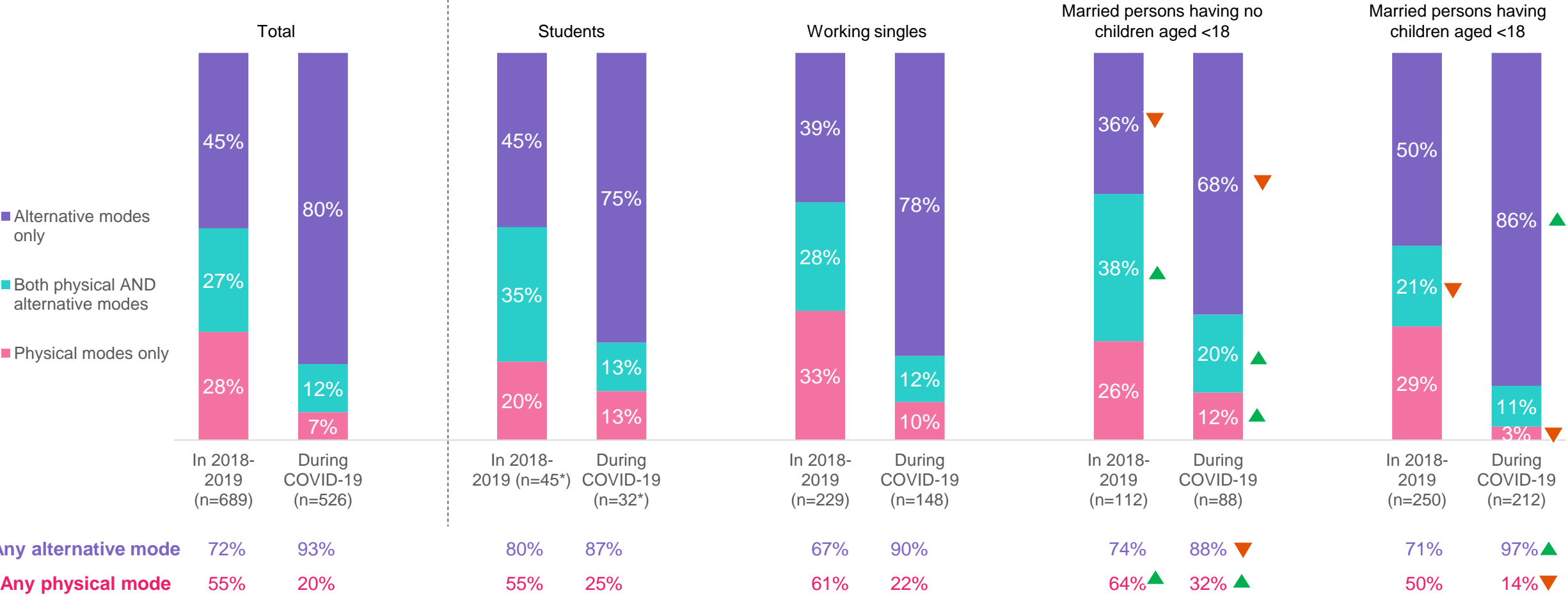


	In 2018 – 2019 (n=689)	During COVID-19 (n=526)
In-person admission	55%	20%
Any alternative mode	72%	93%
TV/ radio broadcast	30%	43%
Paid video-on-demand platforms (e.g. HBO, Netflix)	30%	40%
Social media platforms (e.g. Facebook, YouTube)	40%	52%
Video conferencing app (e.g. Zoom)	8%	14%
Designated official websites	9%	13%
DVD / CD	11%	11%
Via other online channels	12%	13%

# Mode of participation among arts participants – Film and Media Arts – by life segments

Note to readers: The segment of retirees (n=5 in 2018-2019, n=1 during COVID-19) is not shown due to small base

- The adaptation to alternative-mode participation was observed across different life segments, especially among married persons having children aged under 18.



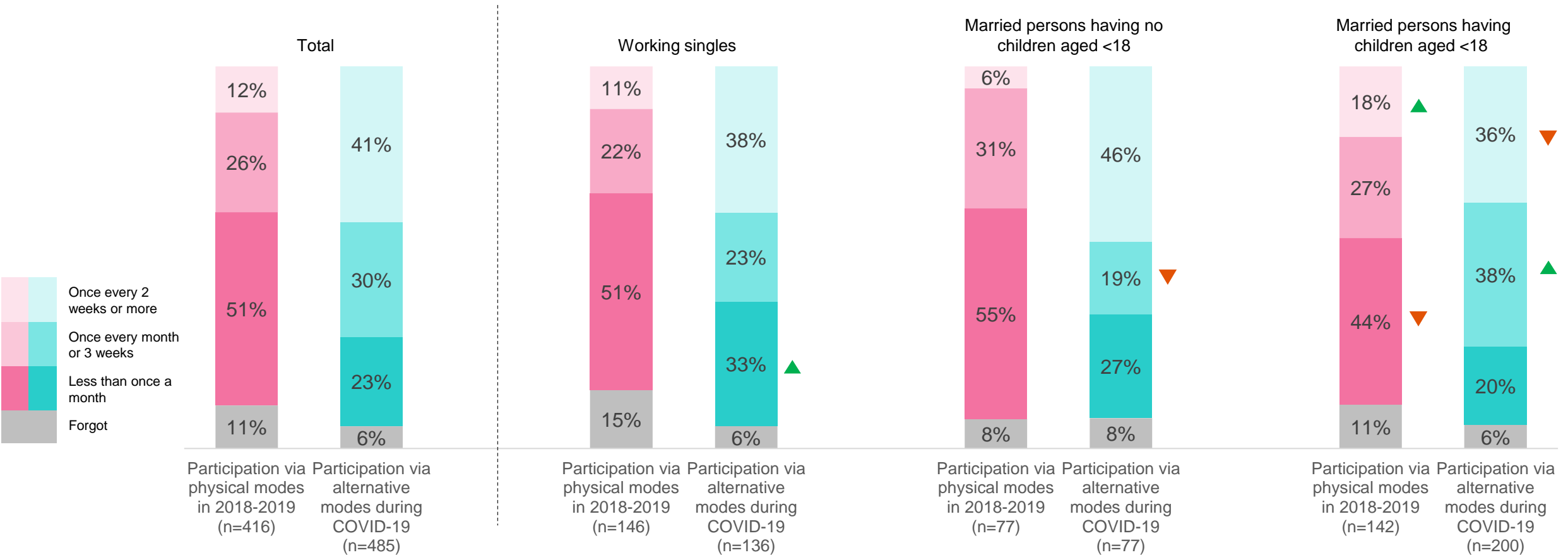
Base: Arts participants of respective art form in 2018-2019 and those during COVID-19

▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

# Changing frequency from physical to alternative modes – Film and Media Arts

Note to readers: The segments of students (n=25 in 2018-2019, n=28 during COVID-19) and retirees (n=4 in 2018-2019, n=1 during COVID-19) are not shown due to small base

- Compared to physical-mode participation in 2018-2019, alternative-mode participation in Film and Media Arts during COVID-19 was more frequent.



Note: Respondents are asked for their average yearly participation via physical modes in 2018-2019, and their total participation via alternative modes during COVID-19.

Base: Physical-mode participants of respective art form in 2018-2019, and alternative-mode participants of respective art form during COVID-19

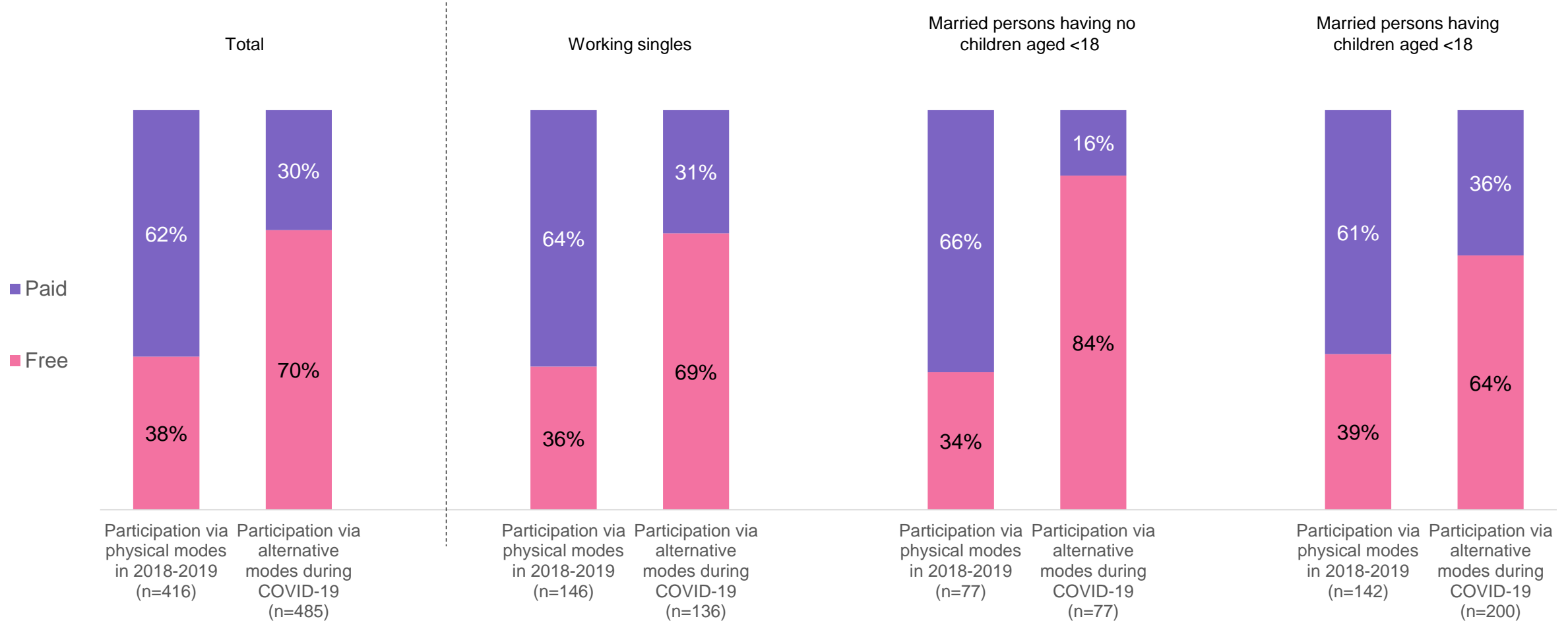
▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total



# Average ratio of participating free/ paid arts programmes – Film and Media Arts

Note to readers: The segments of students (n=25 in 2018-2019, n=28 during COVID-19) and retirees (n=4 in 2018-2019, n=1 during COVID-19) are not shown due to small base

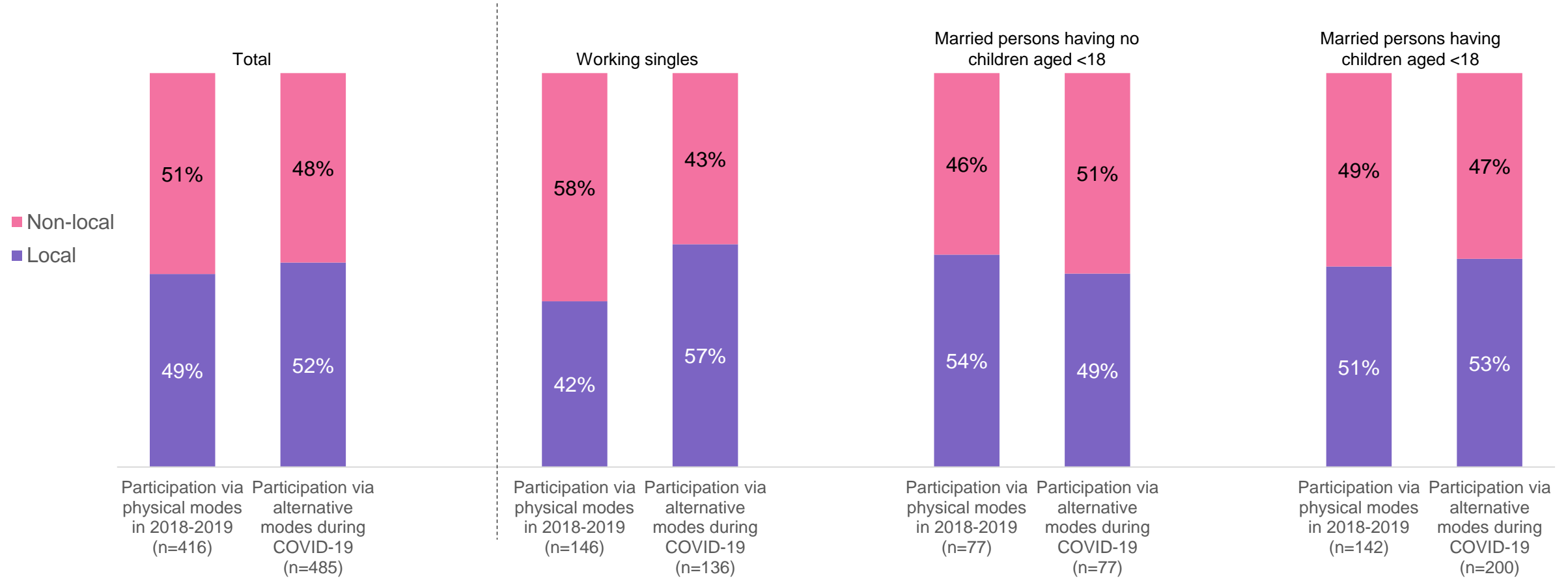
- Alternative-mode participants during COVID-19 had enjoyed significantly more free programmes than physical-mode participants did before the epidemic.



# Average ratio of participating arts programmes of local/ non-local production – Film and Media Arts

Note to readers: The segments of students (n=25 in 2018-2019, n=28 during COVID-19) and retirees (n=4 in 2018-2019, n=1 during COVID-19) are not shown due to small base

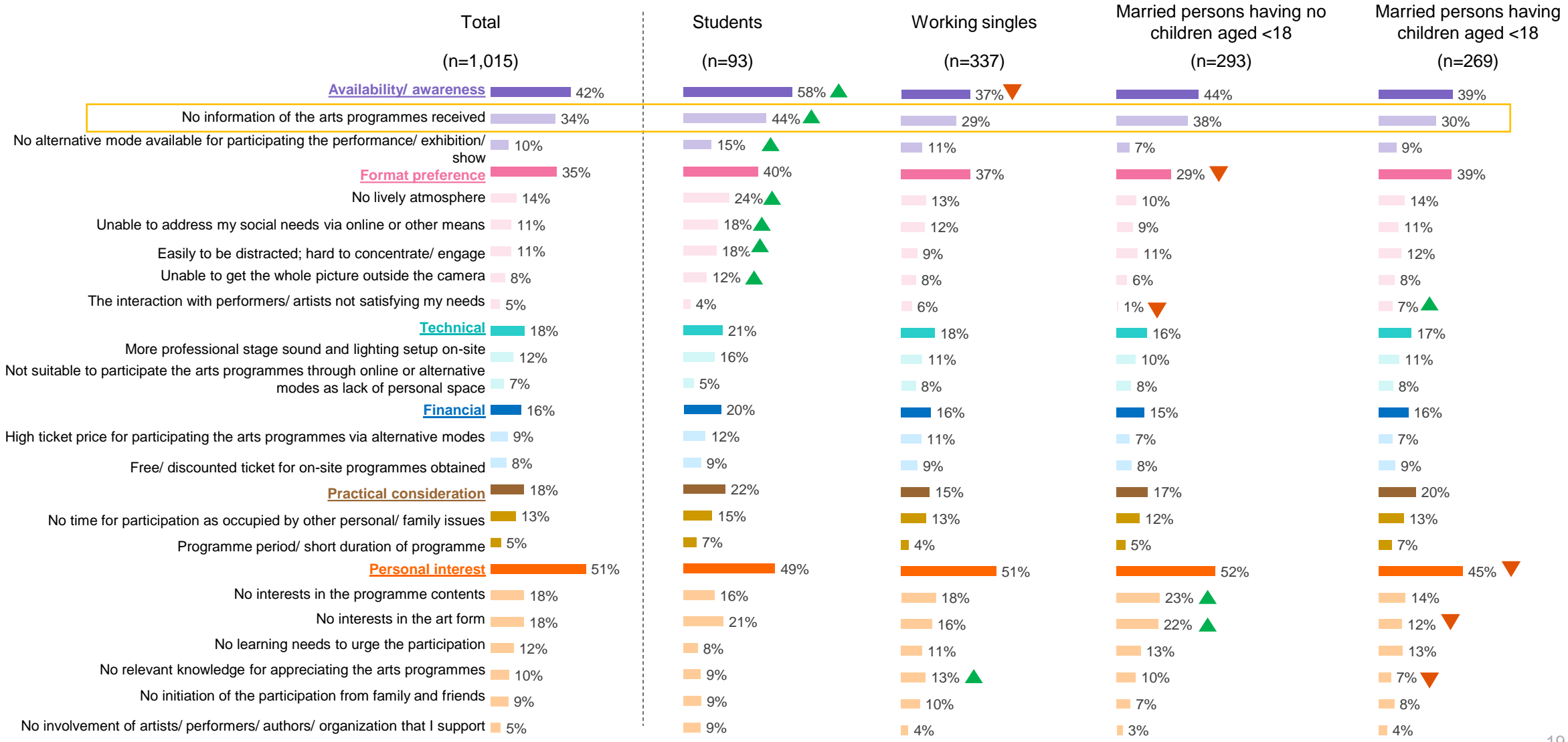
- Alternative-mode participation in local and non-local productions during COVID-19 was at a similar level as compared with the physical-mode participation in 2018-2019.



# Reasons for not participating via alternative modes during COVID-19 – Film and Media Arts

Note to readers: The segment of retirees is not shown due to small base (n=25)

- Lack of programme information (34%) was the common barrier to alternative-mode participation during COVID-19. Students in particular were also concerned with the format of alternative modes.



**Top reason**

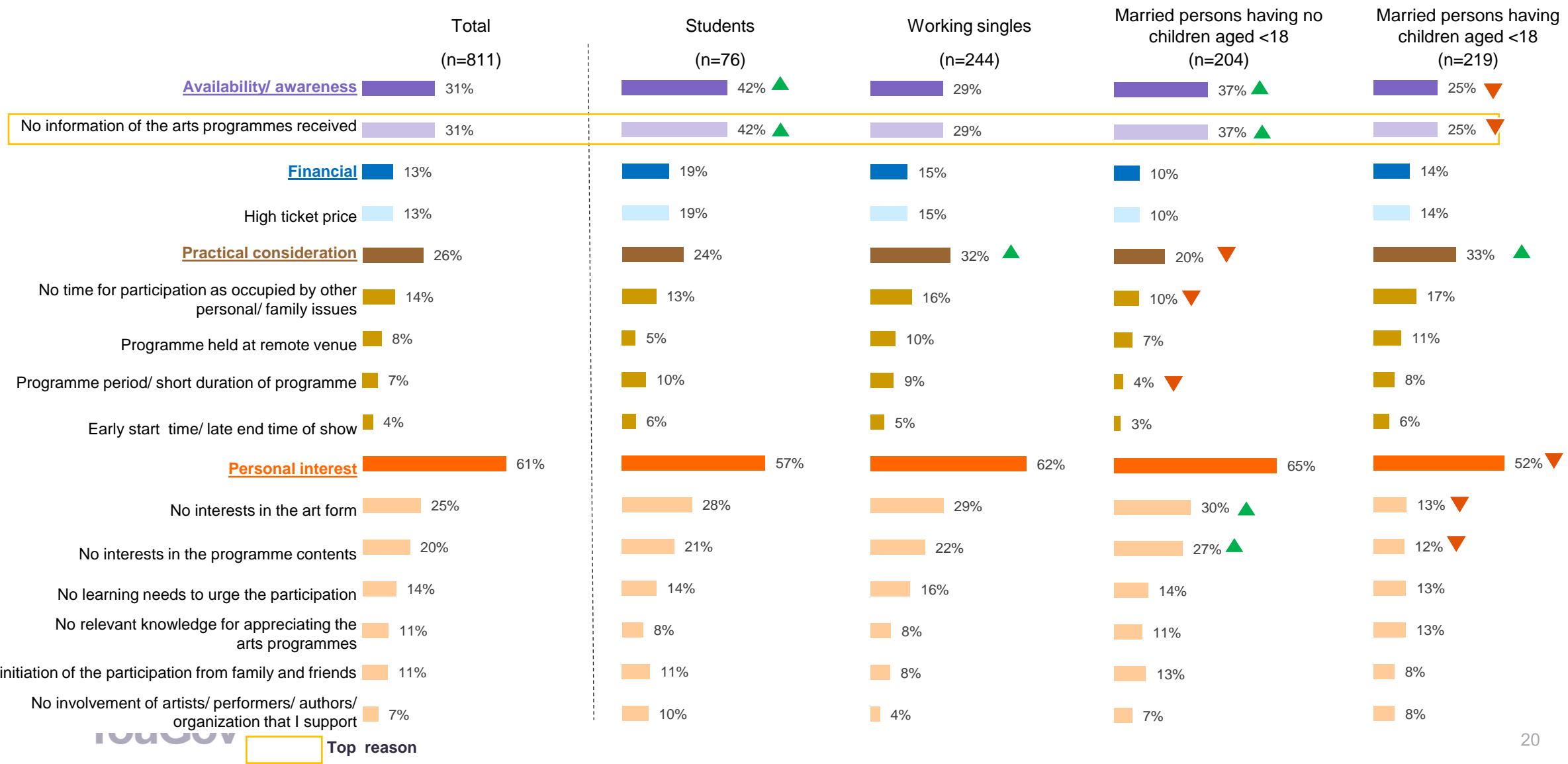
Base: Non-participants of Film and Media Arts programme via alternative modes during COVID-19

▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

# Reasons for not participating in 2018-2019 – Film and Media Arts

Note to readers: The segment of retirees is not shown due to small base (n=21)

- Lack of programme information was also the dominant reason for non-participation in Film and Media Arts in 2018-2019.



Top reason

Base: Non-participants of Film and Media Arts programme in 2018-2019  
 ▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

# Voices of respondents in participating the arts activities in alternative modes

## Film and Media Arts

確保直播順暢，避免技術問題

Male, aged 31

現場 / 影後解說

Male, aged 24

多播放不同國家和題材的電影

Female, aged 45

提升流暢度，解像度

Female, aged 21

音樂效果方面要加強，才能彌補線上看而欠缺現場感的缺點

Female, aged 20

more independent movies

Female, aged 51

maybe a preparation pack can be sent prior to the streaming to enhance the Experience

Female, aged 37

希望有一些即使利用網上媒體都有現場的氣氛

Female, aged 39

多播放不同國家和題材的電影

Female, aged 45

Movie-plot analysis

Male, aged 45

不要太曲高和寡

Male, aged 24

為網上觀看的觀眾提供時限，可於期間內分段重複收看。

Female, aged 28

本地創意製作

Female, aged 45

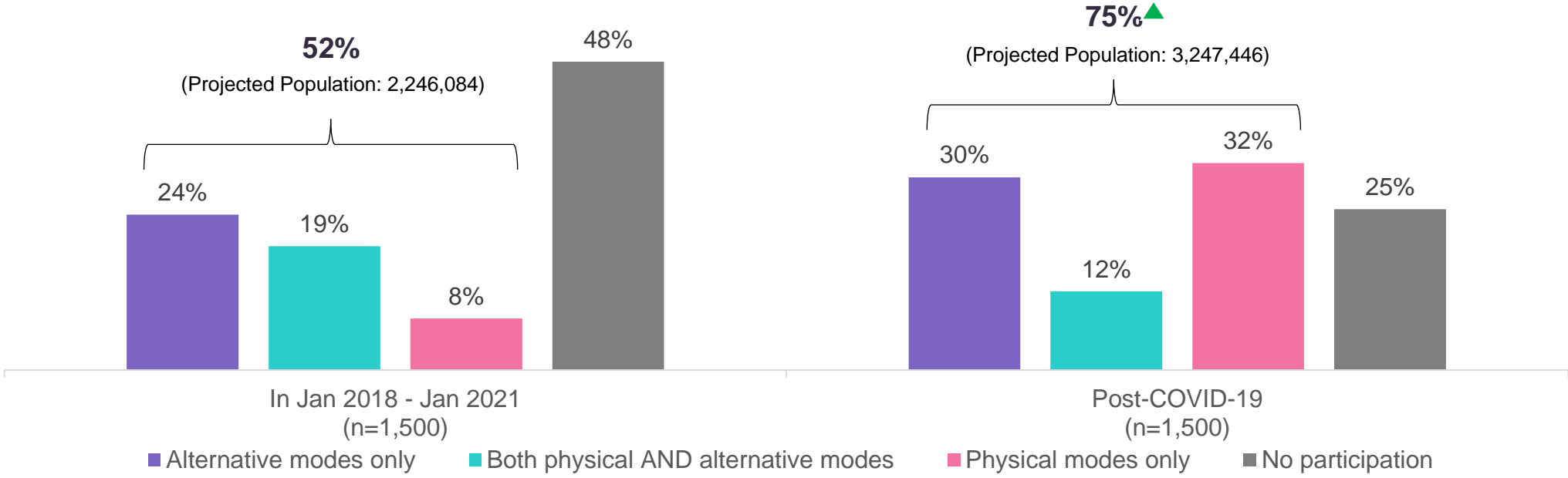
加影評人分享

Female, aged 32

# **Potential Participants of Film and Media Arts**

# Arts participation in Jan 2018 - Jan 2021 and claimed interest at post-COVID-19 period – Film and Media Arts

- Three quarters of respondents expressed interest in participating in Film and Media Arts in the future, more than the actual participation incidence (52%) in the art form in recent years.
- Physical participation was expected to grow strongly whereas participation in alternative modes would register a mild drop.



	In Jan 2018 - Jan 2021	Projected Population	Post-COVID-19	Projected Population
<b>Any alternative mode</b>	44%	1,895,462	42%	1,841,892
<b>Any physical mode</b>	27%	1,191,261	45%	1,938,824



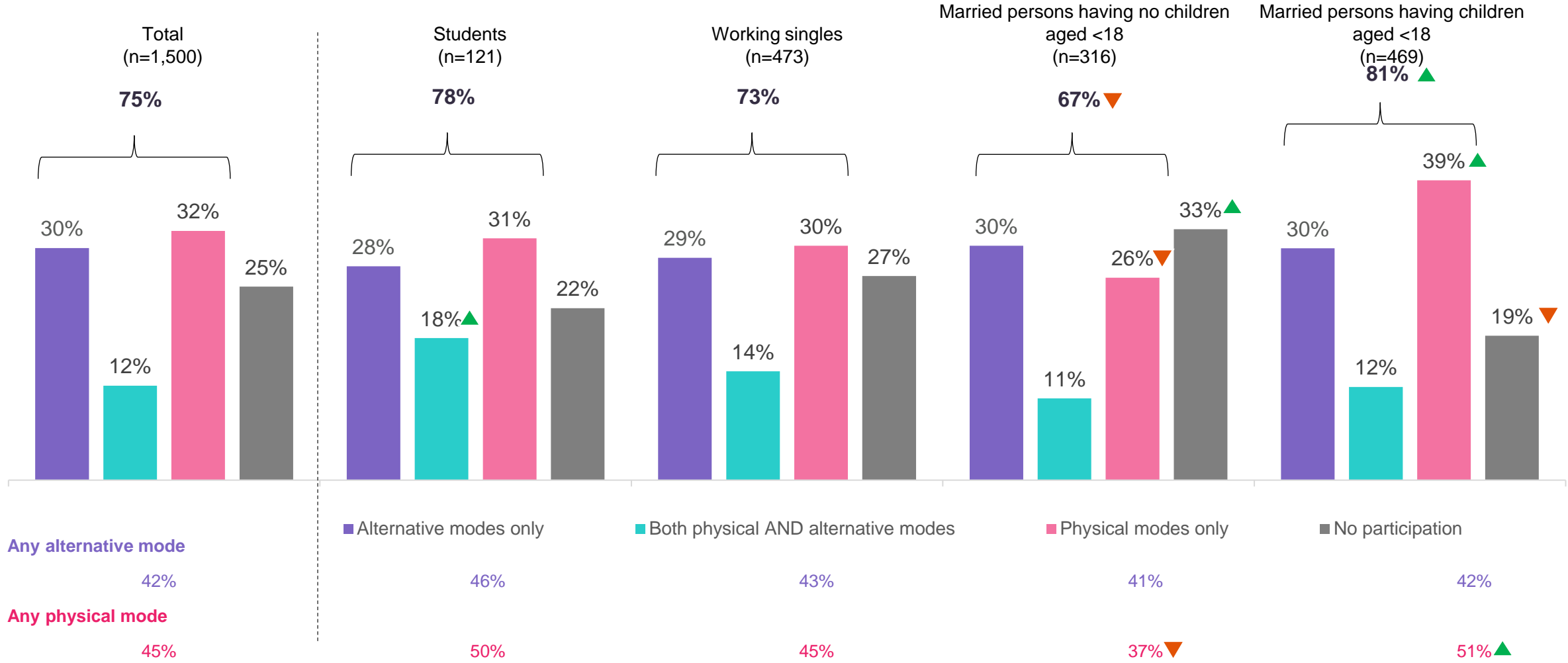
Base: All respondents, n=1,500

▲ ▼ Denote the figure of post-COVID-19 interest is significantly higher/ lower than the actual participation incidence in Jan 2018 – Jan 2021

# Claimed interest in arts participation at post-COVID-19 period – Film and Media Arts – by life segments

Note to readers: The segment of retirees is not shown due to small base (n=26)

- Married persons having children under 18 were the keenest to participate in future, and they shown a clear preference for physical modes.



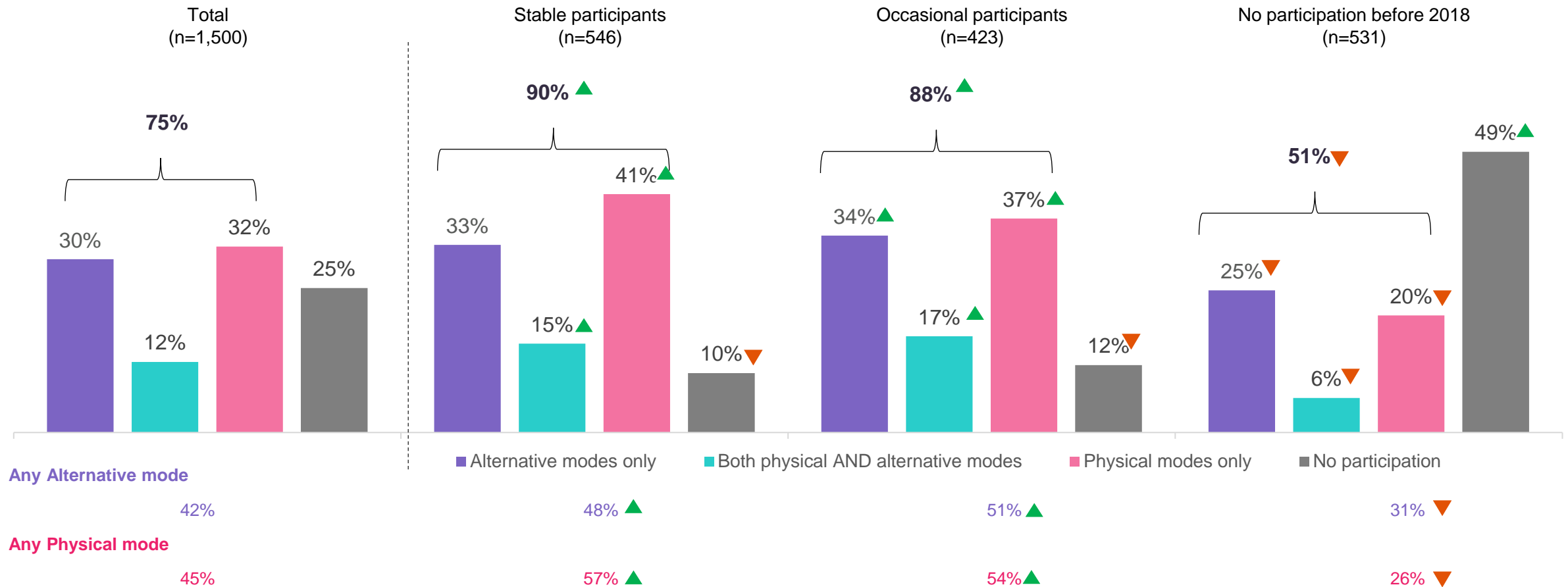
Base: All respondents, n=1,500

▲▼ Denote the figure of the segment is significantly higher/ lower than the total



# Claimed interest in arts participation at post-COVID-19 Period – Film and Media Arts – by participation frequency

- Both stable and occasional participants before 2018 were similarly likely to participate in future Film and Media Arts programmes, with stable participants showing slightly stronger preference towards physical participation.



# Acceptable price level for arts participation via alternative modes at post-COVID-19 period – Film and Media Arts – by life segments

Note to readers: The segment of retirees (n=9) is not shown due to small base  
 Assuming ticket price HKD100 for in-person admission

- Slightly over half of potential alternative-mode participants were willing to pay at post-COVID-19 period, and they typically expected the alternative-mode programmes to be 36% cheaper than the same programmes in physical modes. Working singles were prepared to pay for a higher price.



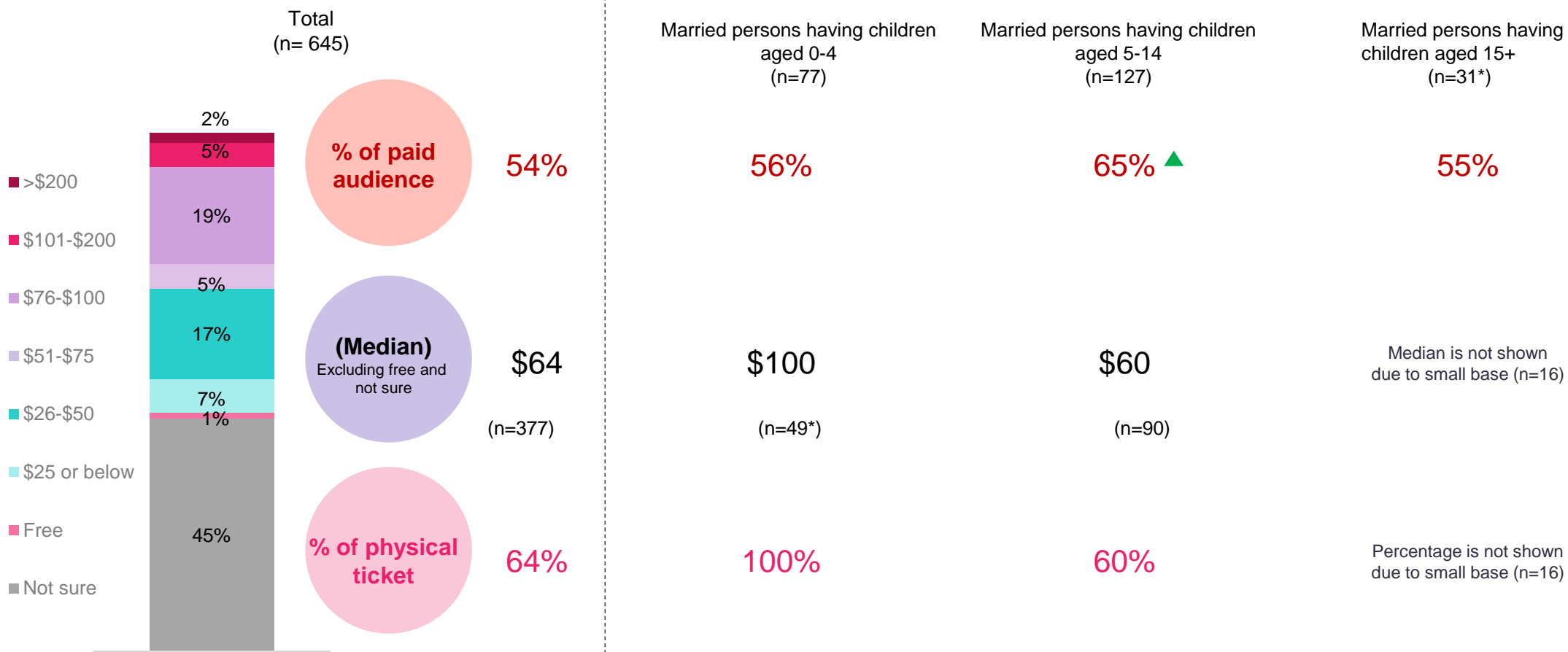
Base: Those consider alternative modes for participating respective art forms at post-COVID-19

▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

# Acceptable price level for arts participation via alternative modes at post-COVID-19 period – Film and Media Arts – by life segments

Assuming ticket price HKD100 for in-person admission

- More married persons having children aged 5-14 would be ready to pay for alternative-mode programmes but those with children aged 4 or below were willing to pay more.



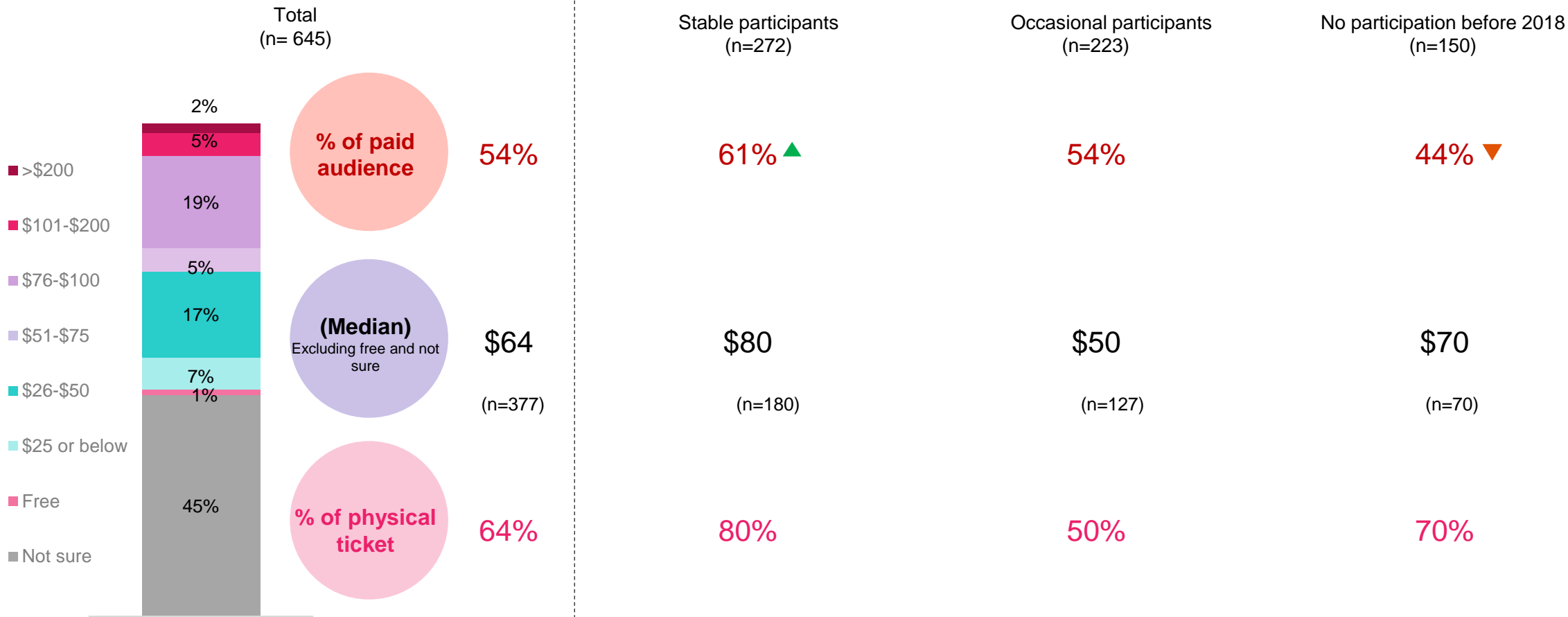
Base: Those consider alternative modes for participating respective art forms at post-COVID-19

▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

# Acceptable price level for arts participation via alternative modes at post-COVID-19 period – Film and Media Arts – by participation frequency

Assuming ticket price HKD100 for in-person admission

- Compared to occasional participants, stable participants before 2018 would be more willing to pay for alternative-mode Film and Media Arts programmes.



Note: Stable participants are those with stable participation from less than 5 years to more than 10 years before 2018  
Occasional participants are those with any occasional participation before 2018

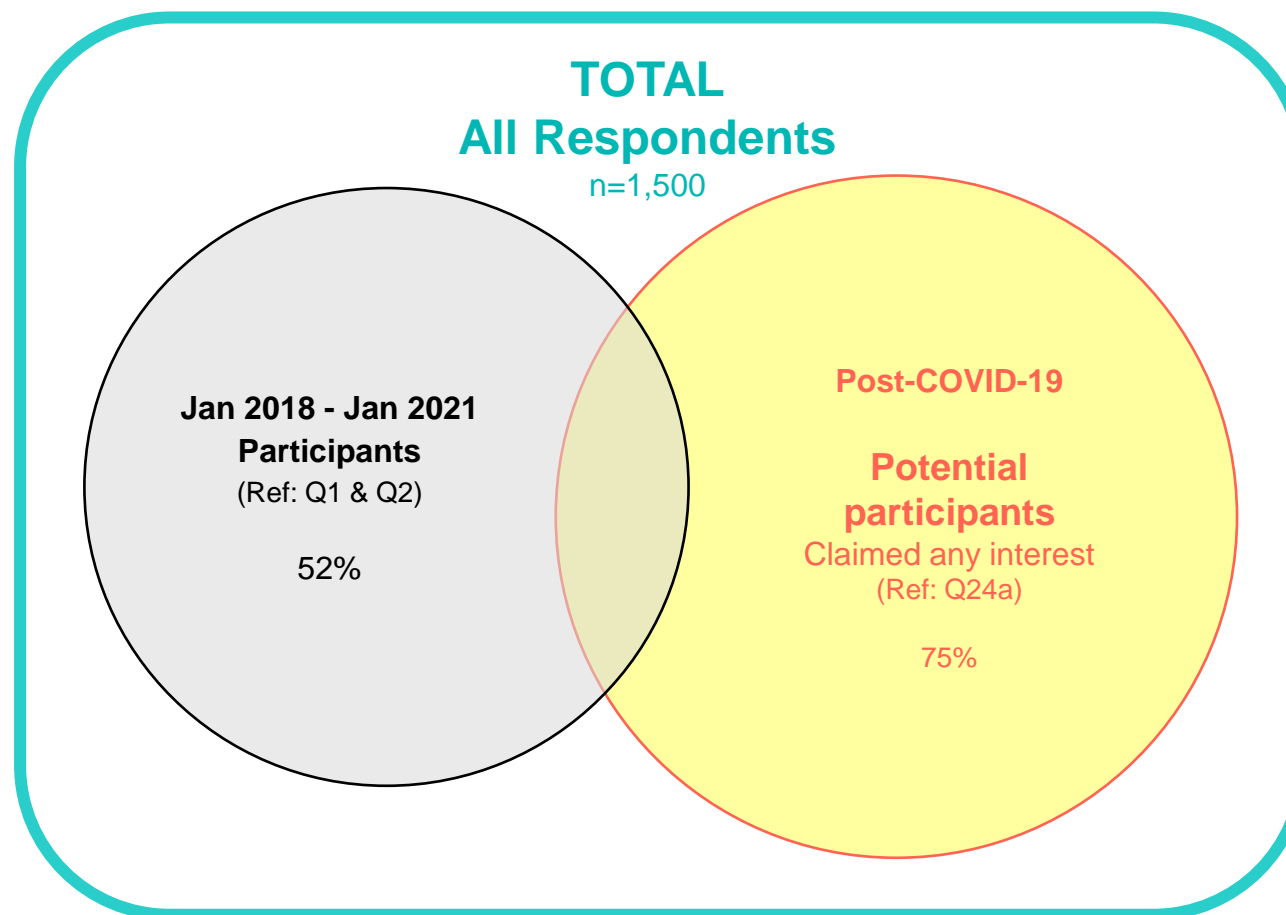
Base: Those consider alternative modes for participating respective art forms at post-COVID-19

▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

# **Profiles of Potential Participants of Film and Media Arts**

# Actual participants in Jan 2018 – Jan 2021 and potential participants at post-COVID-19 period – Film and Media Arts

- TOTAL
- Participants in Jan 2018 – Jan 2021
- Potential participants



# Profiles of potential participants - Film and Media Arts

- Both actual participants in Jan 2018 – Jan 2021 and potential participants at post-COVID-19 period were skewed towards young adults aged 25-34 and married persons having children under 18. They also tended to have higher education level and household income.

	Total (n=1,500)	Participants in Jan 2018 – Jan 2021 (n=790)	Potential participants (n=1,122)
<b>Gender</b>			
Male	44%	45%	44%
Female	56%	55%	56%
<b>Age Group</b>			
16-24	13%	14%	13%
25-34	20%	24% ▲	22% ▲
35-44	22%	22%	23%
45-54	22%	20%	23%
55-64	23%	20% ▼	20% ▼
<b>Occupation</b>			
Business owners/ Managers and professionals	14%	15%	15% ▲
White-collar	27%	28%	26% ▼
Blue-collar	34%	38% ▲	34%
Housewives	7%	5% ▼	7%
Students	9%	9%	10%
Retirees	3%	1% ▼	3%
Unemployed	5%	5%	5%
<b>Life Segment</b>			
Students	9%	9%	10%
Working singles	22%	23%	22%
Married persons having no children aged <18	24%	18% ▼	22% ▼
Married persons having children aged <18	32%	38% ▲	35% ▲
<b>Education Level</b>			
Secondary or below	45%	40% ▼	41% ▼
Post-secondary / University	55%	60% ▲	59% ▲
<b>Monthly Household Income</b>			
Below HKD 30,000	64%	61% ▼	62% ▼
HKD 30,000 - 49,999	24%	27% ▲	25% ▲
More than HKD 50,000	12%	13%	13%

	Total (n=1,500)	Participants in Jan 2018 – Jan 2021 (n=790)	Potential participants (n=1,122)
<b>Region &amp; living district</b>			
Hong Kong Island	17%	19%	17%
Central & Western	3%	3%	4%
Eastern	8%	9%	8%
Southern	4%	4%	3%
Wan Chai	2%	3% ▲	2%
Kowloon	30%	34% ▲	31%
Kowloon City	6%	6%	5%
Kwun Tong	8%	10% ▲	9% ▲
Sham Shui Po	6%	7%	6%
Wong Tai Sin	6%	6%	5%
Yau Tsim Mong	4%	5%	4%
New Territories	53%	48% ▼	52%
Kwai Tsing	7%	5% ▼	6%
North	5%	4%	5%
Sai Kung	7%	7%	7%
Sha Tin	8%	7%	8%
Tai Po	4%	4%	4%
Tsuen Wan	4%	3% ▼	4%
Tuen Mun	8%	7%	8%
Yuen Long	8%	7%	7%
Islands	3%	3% ▲	3% ▲

## Other observations:

	Potential alternative-mode participants	Potential paid alternative-mode participants
Post-secondary / University	59%	65%
MHI below HKD 30,000	63%	56%



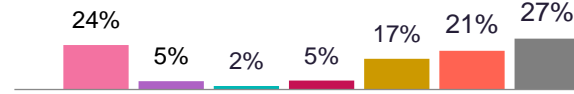
# Profiles of potential participants - Film and Media Arts

- Over 40% of the potential participants were lapsed participants, meaning that they were still interested in Film and Media Arts despite their non-participation in this art form recently. (See slides 49-50 for reasons of non-participation of these lapsed participants)

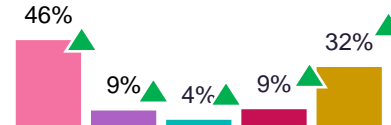
## Distribution of segments

- Retaining participants
- Young participants
- New participants
- Returning participants
- Lapsed participants since COVID-19
- Lapsed participants since 2018
- Non-participants

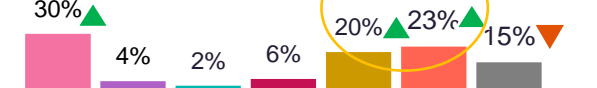
Total  
(n=1,500)



Participants in Jan 2018 – Jan 2021  
(n=790)

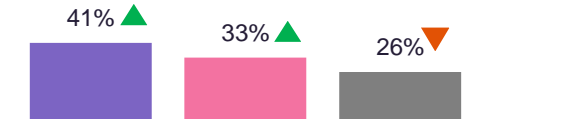
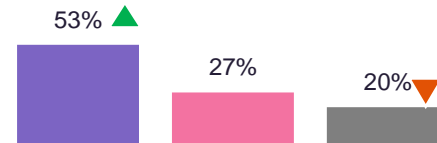
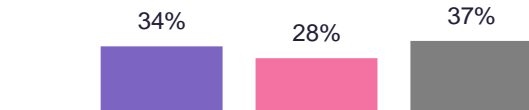


Potential participants  
(n=1,122)



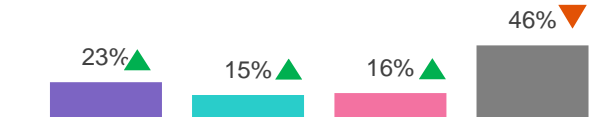
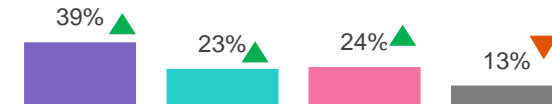
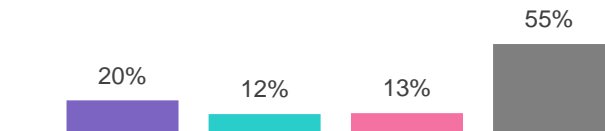
## Participation before 2018

- Stable participation
- Occasional participation
- No participation



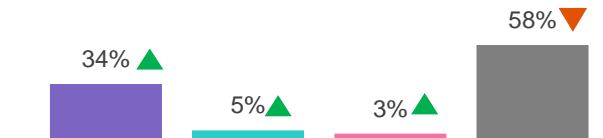
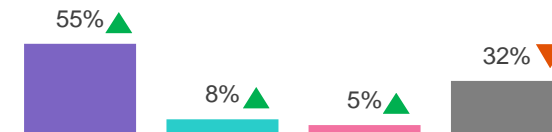
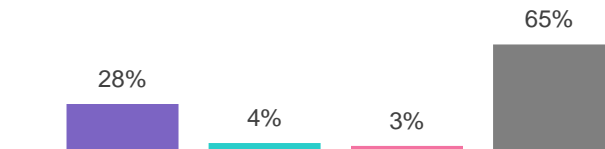
## Mode of participation in 2018 – 2019

- Alternative modes only
- Both physical AND alternative modes
- Physical modes only
- No participation



## Mode of participation during COVID-19

- Alternative modes only
- Both physical AND alternative modes
- Physical modes only
- No participation

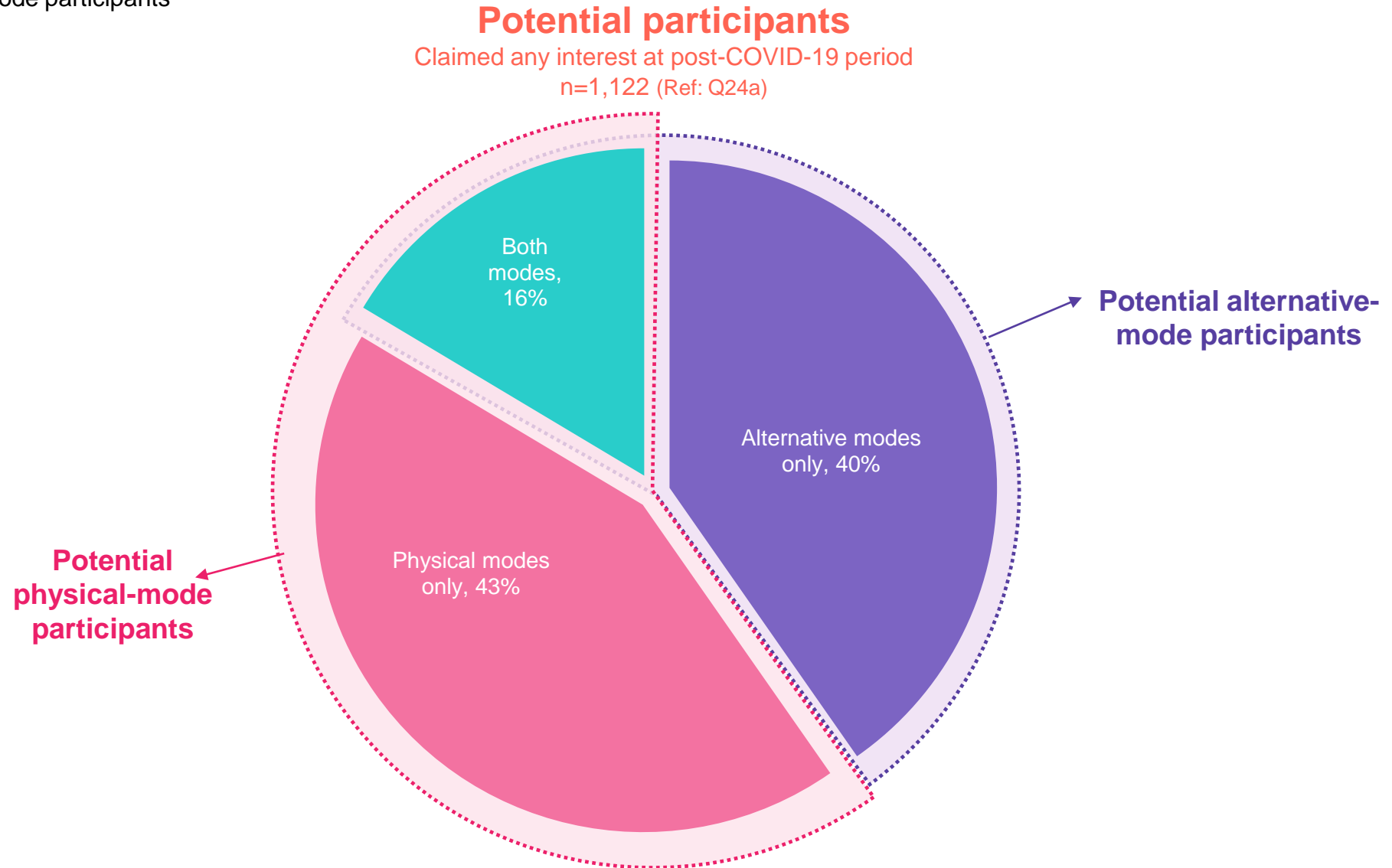




# **Profile of Potential Participants – by Mode of Participation**

# Distribution of potential participants by mode preference – Film and Media Arts

- Potential participants
- Potential physical-mode participants
- Potential alternative-mode participants



# Profiles of potential participants – Film and Media Arts – by mode of participation

- The profiles of potential physical-mode and alternative-mode participants were largely similar. Both were consisted of people with higher education attainment, and about one-third of them were married persons having children aged under 18.

	Potential participants (n=1,122)	Potential physical-mode participants (n=686)	Potential alternative-mode participants (n=645)
<b>Gender</b>			
Male	44%	45%	43%
Female	56%	55%	57%
<b>Age Group</b>			
16-24	13%	14%	14%
25-34	22%	22%	21%
35-44	23%	21%	23%
45-54	23%	24%	20%
55-64	20%	19%	21%
<b>Occupation</b>			
Business owners/ Managers and professionals	15%	16%	15%
White-collar	26%	26%	26%
Blue-collar	34%	34%	33%
Housewives	7%	6%	8%
Students	10%	10%	10%
Retirees	3%	3%	3%
Unemployed	5%	4%	6%
<b>Life Segment</b>			
Students	10%	10%	10%
Working singles	22%	22%	23%
Married persons having no children aged <18	22%	20%	23%
Married persons having children aged <18	35%	37%	32%
<b>Education Level</b>			
Secondary or below	41%	39%	41%
Post-secondary / University	59%	61%	59%
<b>Monthly Household Income</b>			
Below HKD 30,000	62%	59%	63%
HKD 30,000 - 49,999	25%	27%	23%
More than HKD 50,000	13%	14%	14%

	Potential participants (n=1,122)	Potential physical-mode participants (n=686)	Potential alternative-mode participants (n=645)
<b>Region &amp; living district</b>			
Hong Kong Island	17%	16%	16%
Central & Western	4%	3%	3%
Eastern	8%	8%	7%
Southern	3%	3%	3%
Wan Chai	2%	1%	2%
Kowloon	31%	32%	30%
Kowloon City	5%	6%	4%
Kwun Tong	9%	10%	10%
Sham Shui Po	6%	7%	6%
Wong Tai Sin	5%	5%	5%
Yau Tsim Mong	4%	4%	5%
New Territories	52%	52%	54%
Kwai Tsing	6%	8%	4%
North	5%	4%	5%
Sai Kung	7%	6%	7%
Sha Tin	8%	8%	9%
Tai Po	4%	3%	5%
Tsuen Wan	4%	4%	4%
Tuen Mun	8%	8%	7%
Yuen Long	7%	9%	8%
Islands	3%	2%	4%

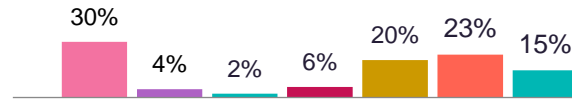
# Profiles of potential participants – Film and Media Arts – by mode of participation

- Compared to potential alternative-mode participants, more potential physical-mode participants only participated in person in 2018-2019. This might explain why a higher percentage of these potential physical-mode participants had lapsed since COVID-19 when physical attendance at arts programmes was less readily available.

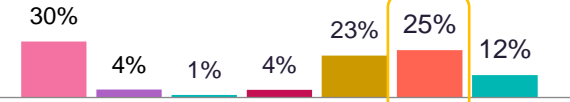
## Distribution of segments

- Retaining participants
- Young participants
- New participants
- Returning participants
- Lapsed participants since COVID-19
- Lapsed participants since 2018
- Non-participants

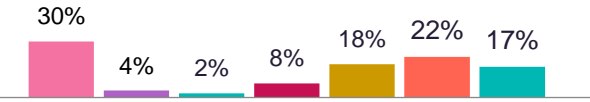
Potential participants (n=1,122)



Potential physical-mode participants (n=686)

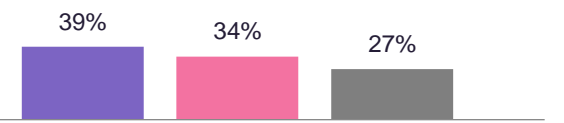
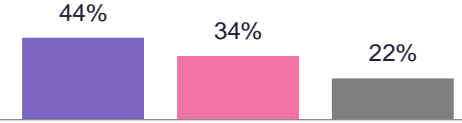
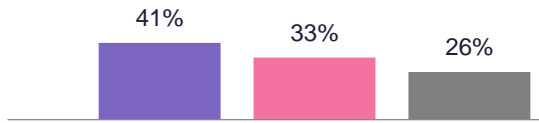


Potential alternative-mode participants (n=645)



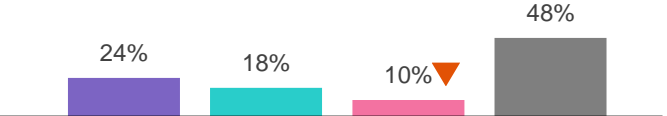
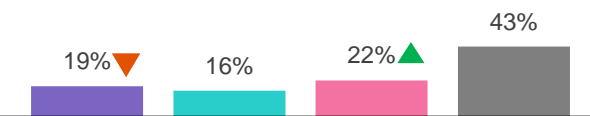
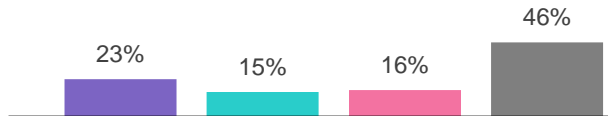
## Participation before 2018

- Stable participation
- Occasional participation
- No participation



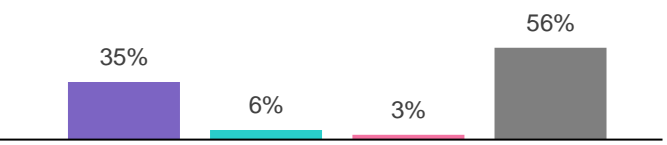
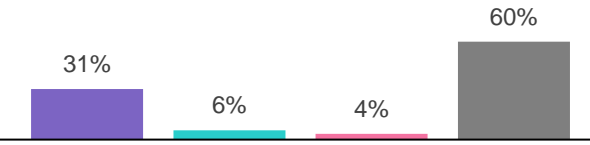
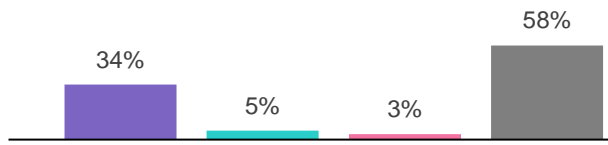
## Mode of participation in 2018 – 2019

- Alternative modes only
- Both physical AND alternative modes
- Physical modes only
- No participation



## Mode of participation during COVID-19

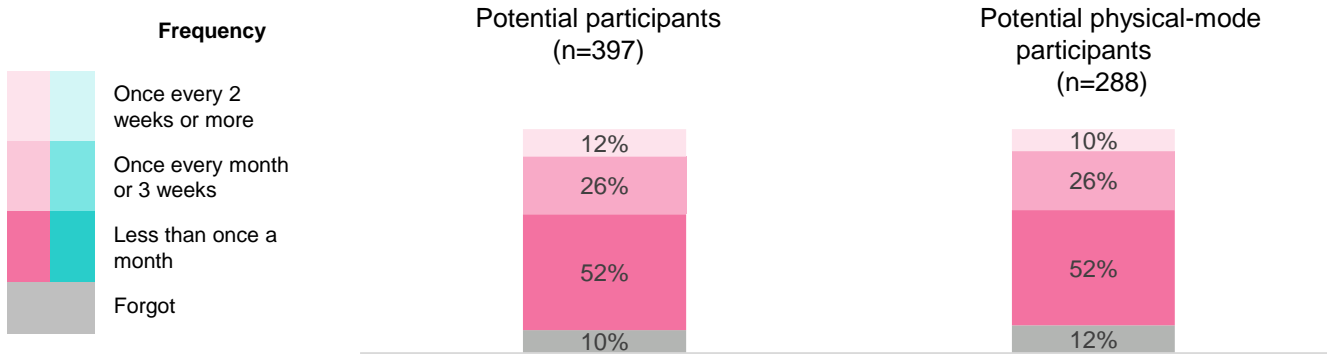
- Alternative modes only
- Both physical AND alternative modes
- Physical modes only
- No participation



# Profiles of potential participants – Film and Media Arts – by mode of participation

- Among the potential alternative-mode participants, their participation in alternative-mode programmes during COVID-19 was more frequent than all potential participants.

## Participation via physical modes in 2018-2019

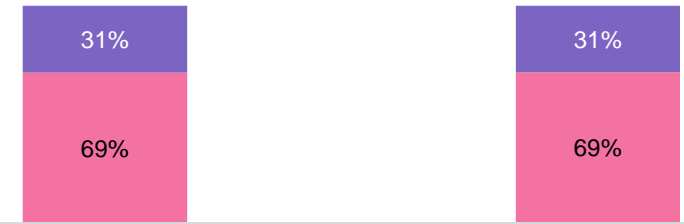


## Participation via alternative modes during COVID-19



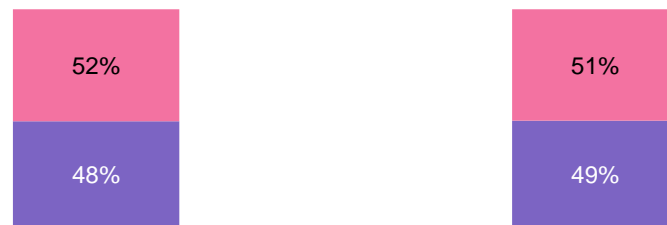
### Average ratio of participating free/ paid arts programmes

- Paid
- Free



### Average ratio of participating of local/ non-local production

- Non-local
- Local



Note: "Participation via physical modes in 2018-2019" includes physical-mode participants in 2018-2019 only, so the bases here do not cover all potential participants.

"Participation via alternative modes during COVID-19" includes alternative-mode participants during COVID-19 only, so the bases here do not cover all potential participants.

Note: For participation frequency, respondents are asked for their average yearly participation via physical modes in 2018-2019, and their total participation via alternative modes during COVID-19.

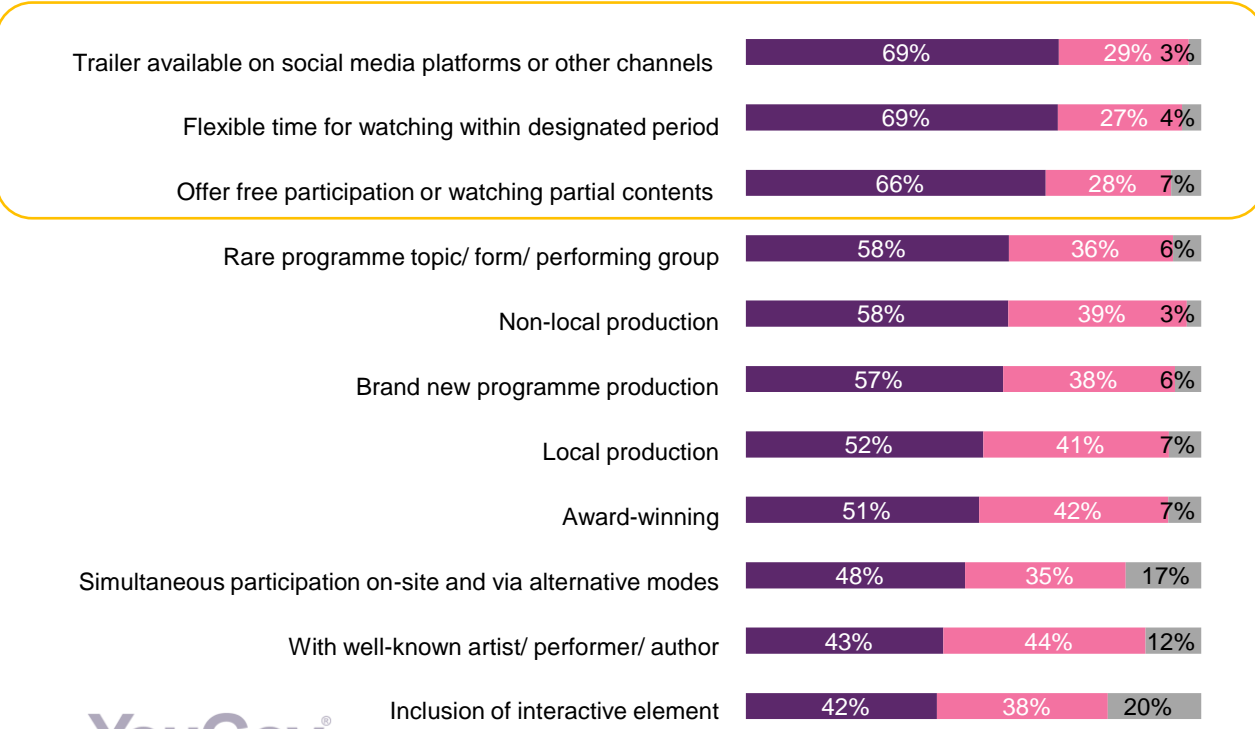
# Profiles of potential participants – Film and Media Arts – important elements and information source for alternative modes

- Trailers on social media platforms, flexible time and offering free participation/ partial contents were the key drivers of alternative-mode participation.
- Social media platforms played an important role in promoting films and media arts programmes.

## Important elements driving alternative modes

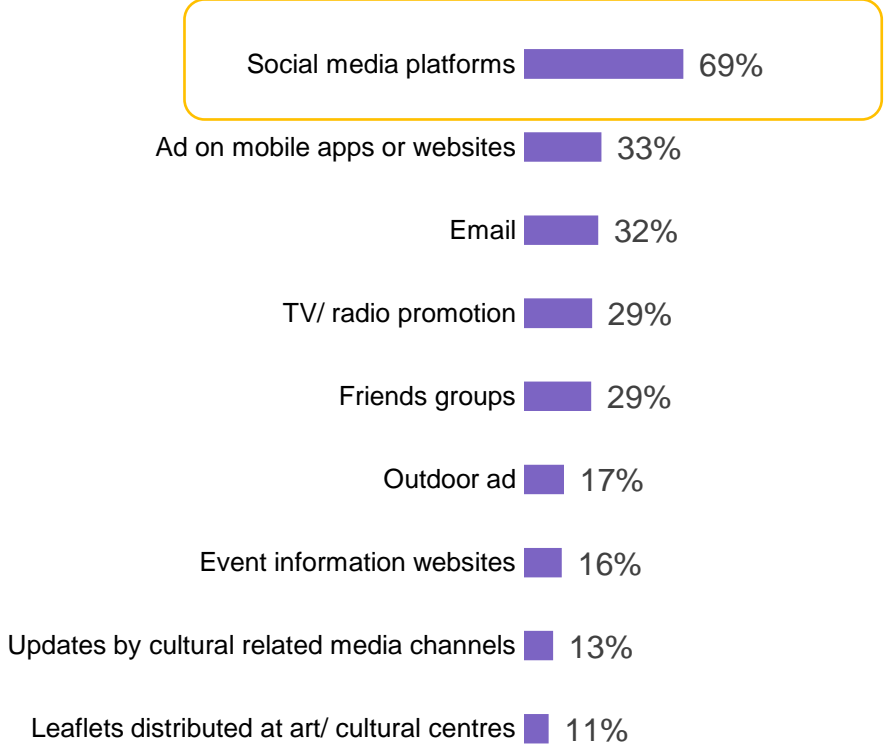
Potential alternative-mode participants (n=645)

- Alternative modes regardless of availability of in-person participation
- Alternative modes only if unable to participate in-person
- In-person participation only



## Information source for alternative modes during COVID-19

Potential alternative-mode participants (n=561)

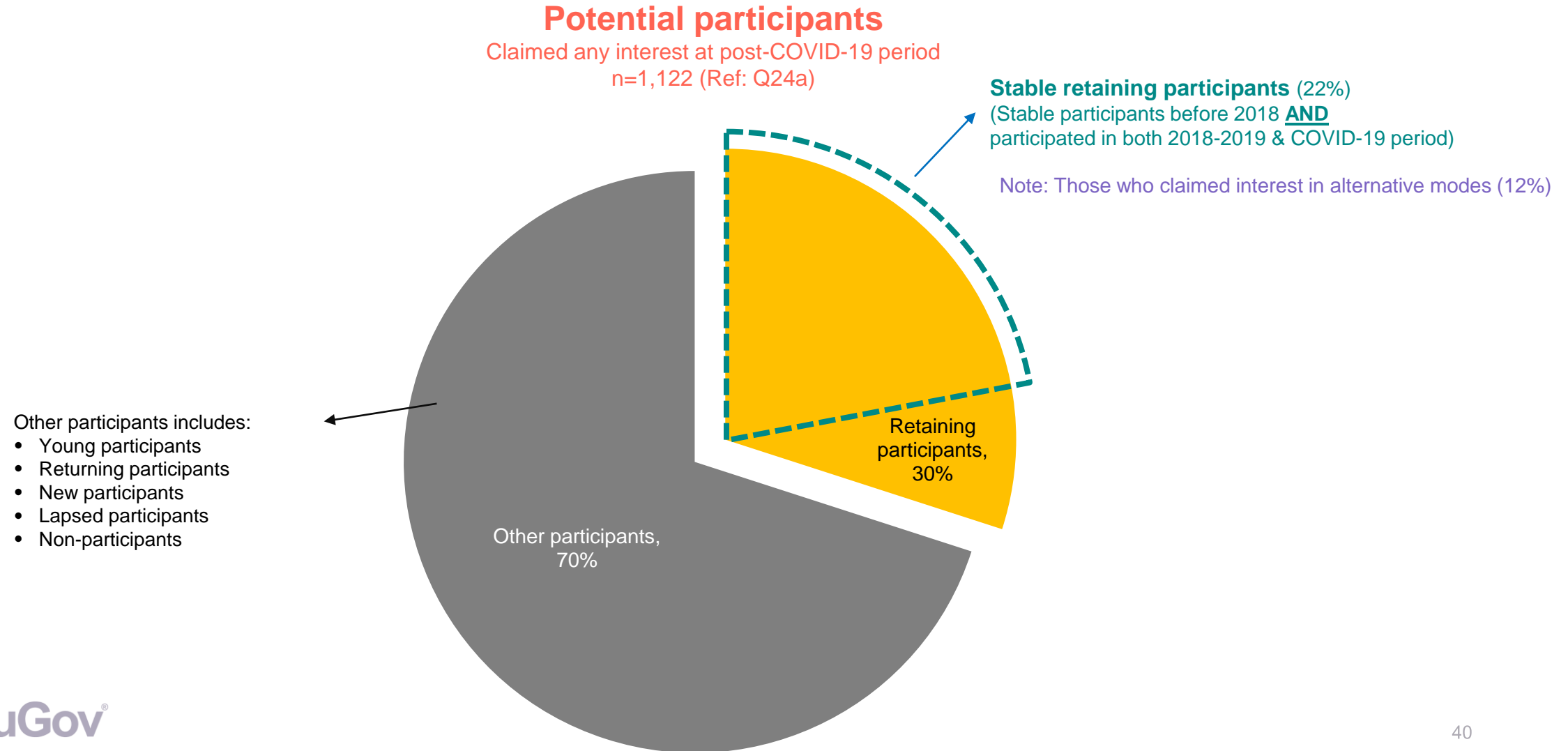


Note: For information source, respondents without awareness of or prior experience in alternative programmes are excluded, so the base does not cover all potential alternative-mode participants.

# **Stable Retaining Participants with Participation Interest at Post-COVID-19 Period**

# Proportion of stable retaining participation with interest among potential participants – Film and Media Arts

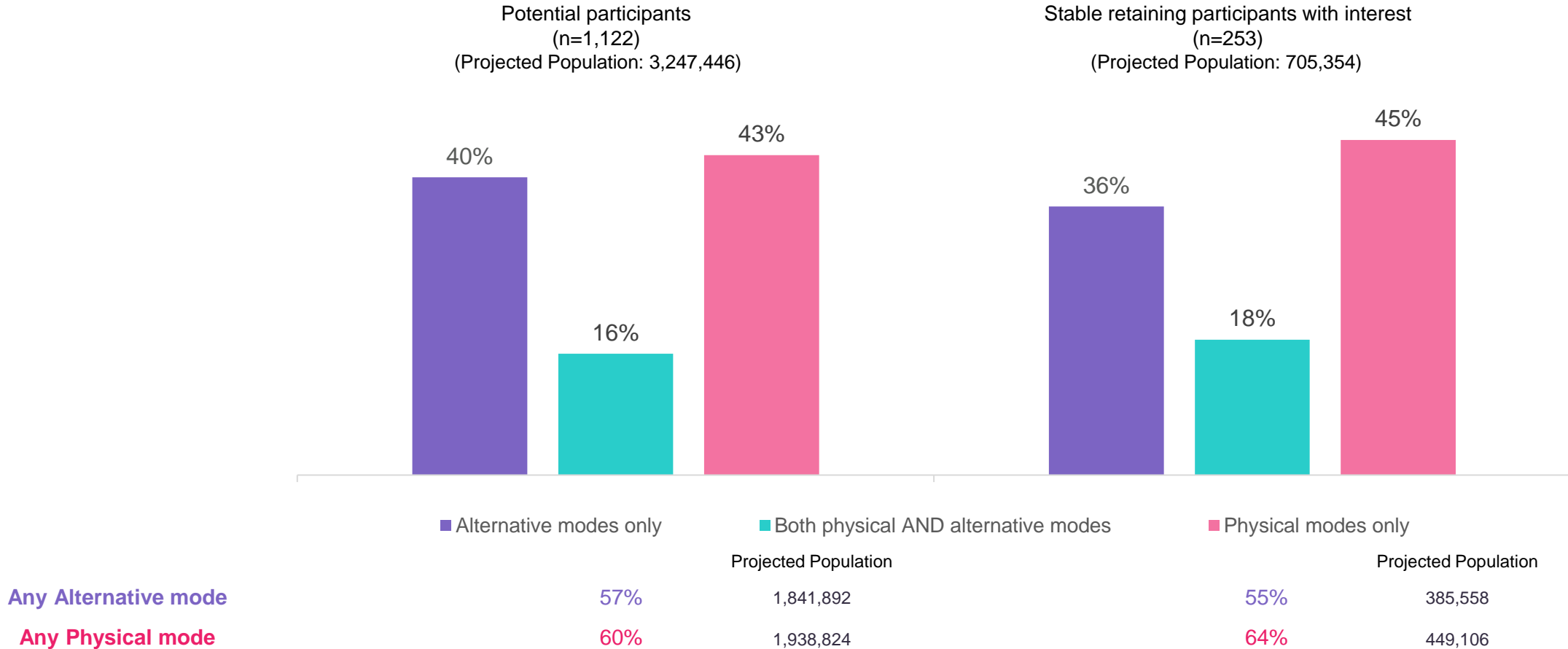
- Stable retaining participants with interest
- Stable retaining participants with interest in alternative modes





# Stable retaining participants with participation interest at post-COVID-19 period – Film and Media Arts

- Stable retaining participants with future participation interest expressed similar levels of interest as all potential participants towards different modes, except that stable retaining participants with interest were slightly more inclined towards physical participation.



Base: Those consider participating respective art forms at post-COVID-19  
 ▲ ▼ Denote the figure of the segment is significantly higher/ lower than the potential participants

# Profiles of stable retaining participants with participation interest at post-COVID-19 period – Film and Media Arts

- Stable retaining participants with interest were skewed towards male and 25-34 years old. Nearly half of them were married persons having children under 18.

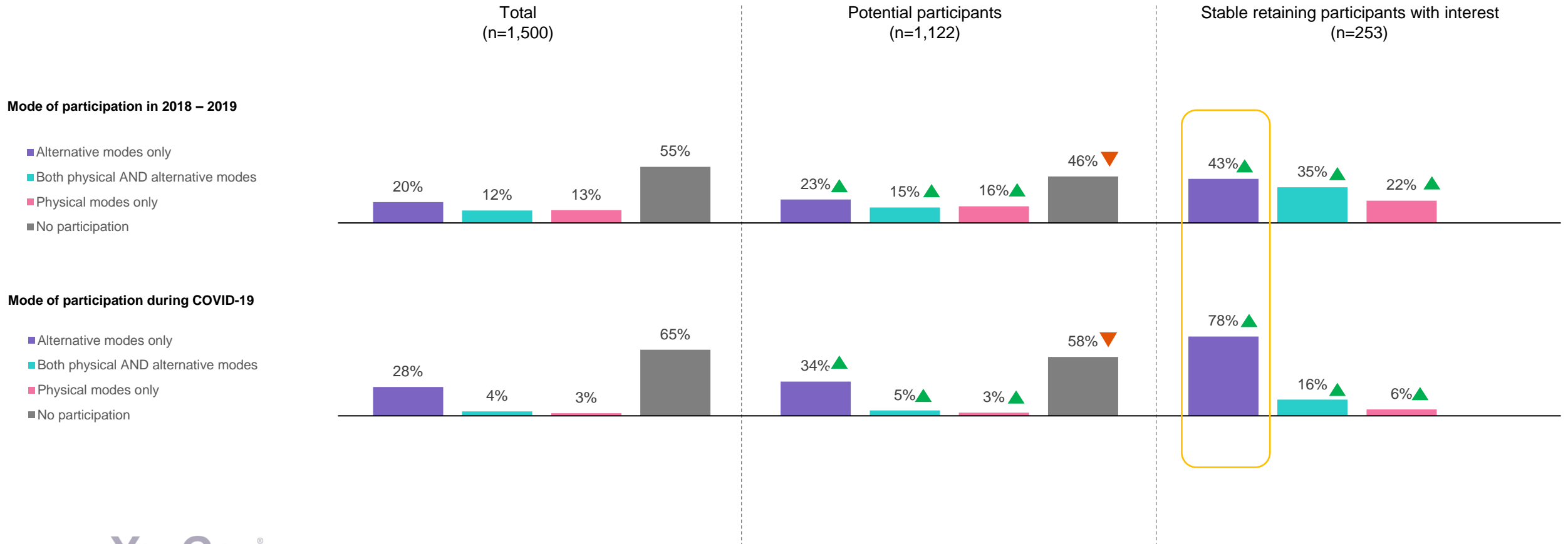
	Total (n=1,500)	Potential participants (n=1,122)	Stable retaining participants with interest (n=253)
<b>Gender</b>			
Male	44%	44%	53% ▲
Female	56%	56%	47% ▼
<b>Age Group</b>			
16-24	13%	13%	10%
25-34	20%	22% ▲	27% ▲
35-44	22%	23%	24%
45-54	22%	23%	23%
55-64	23%	20% ▼	17% ▼
<b>Occupation</b>			
Business owners/ Managers and professionals	14%	15% ▲	21% ▲
White-collar	27%	26% ▼	27%
Blue-collar	34%	34%	41% ▲
Housewives	7%	7%	2% ▼
Students	9%	10%	5% ▼
Retirees	3%	3%	-
Unemployed	5%	5%	4%
<b>Life Segment</b>			
Students	9%	10%	5% ▼
Working singles	22%	22%	19%
Married persons having no children aged <18	24%	22% ▼	18% ▼
Married persons having children aged <18	32%	35% ▲	49% ▲
<b>Education Level</b>			
Secondary or below	45%	41% ▼	36% ▼
Post-secondary / University	55%	59% ▲	64% ▲
<b>Monthly Household Income</b>			
Below HKD 30,000	64%	62% ▼	53% ▼
HKD 30,000 - 49,999	24%	25% ▲	33% ▲
More than HKD 50,000	12%	13%	15%

	Total (n=1,500)	Potential participants (n=1,122)	Stable retaining participants with interest (n=253)
<b>Region &amp; living district</b>			
Hong Kong Island	17%	17%	21%
Central & Western	3%	4%	3%
Eastern	8%	8%	10%
Southern	4%	3%	5%
Wan Chai	2%	2%	3%
Kowloon	30%	31%	32%
Kowloon City	6%	5%	7%
Kwun Tong	8%	9% ▲	11%
Sham Shui Po	6%	6%	6%
Wong Tai Sin	6%	5%	5%
Yau Tsim Mong	4%	4%	2%
New Territories	53%	52%	47% ▼
Kwai Tsing	7%	6%	7%
North	5%	5%	4%
Sai Kung	7%	7%	9%
Sha Tin	8%	8%	8%
Tai Po	4%	4%	4%
Tsuen Wan	4%	4%	3%
Tuen Mun	8%	8%	6%
Yuen Long	8%	7%	4% ▼
Islands	3%	3% ▲	2%

▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

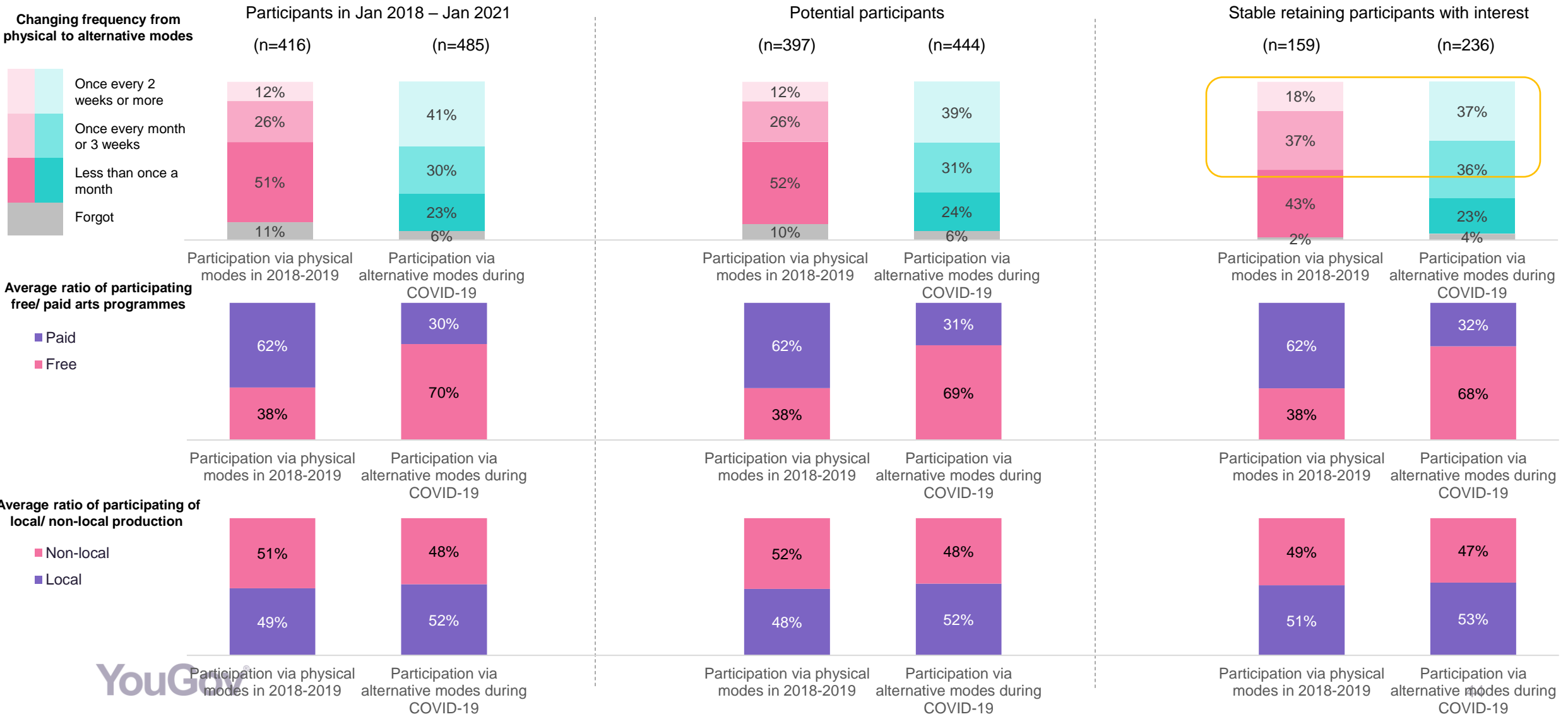
# Profiles of stable retaining participants with participation interest at post-COVID-19 period – Film and Media Arts

- Stable retaining participants with interest had higher adaptation to alternative modes both before and during the COVID-19 outbreak.



# Profiles of stable retaining participants with participation interest at post-COVID-19 period – Film and Media Arts

- Stable retaining participants with interest had been frequent participants in physical modes in 2018-2019, but their alternative-mode participation during COVID-19 was comparatively not as frequent as that of other past participants.

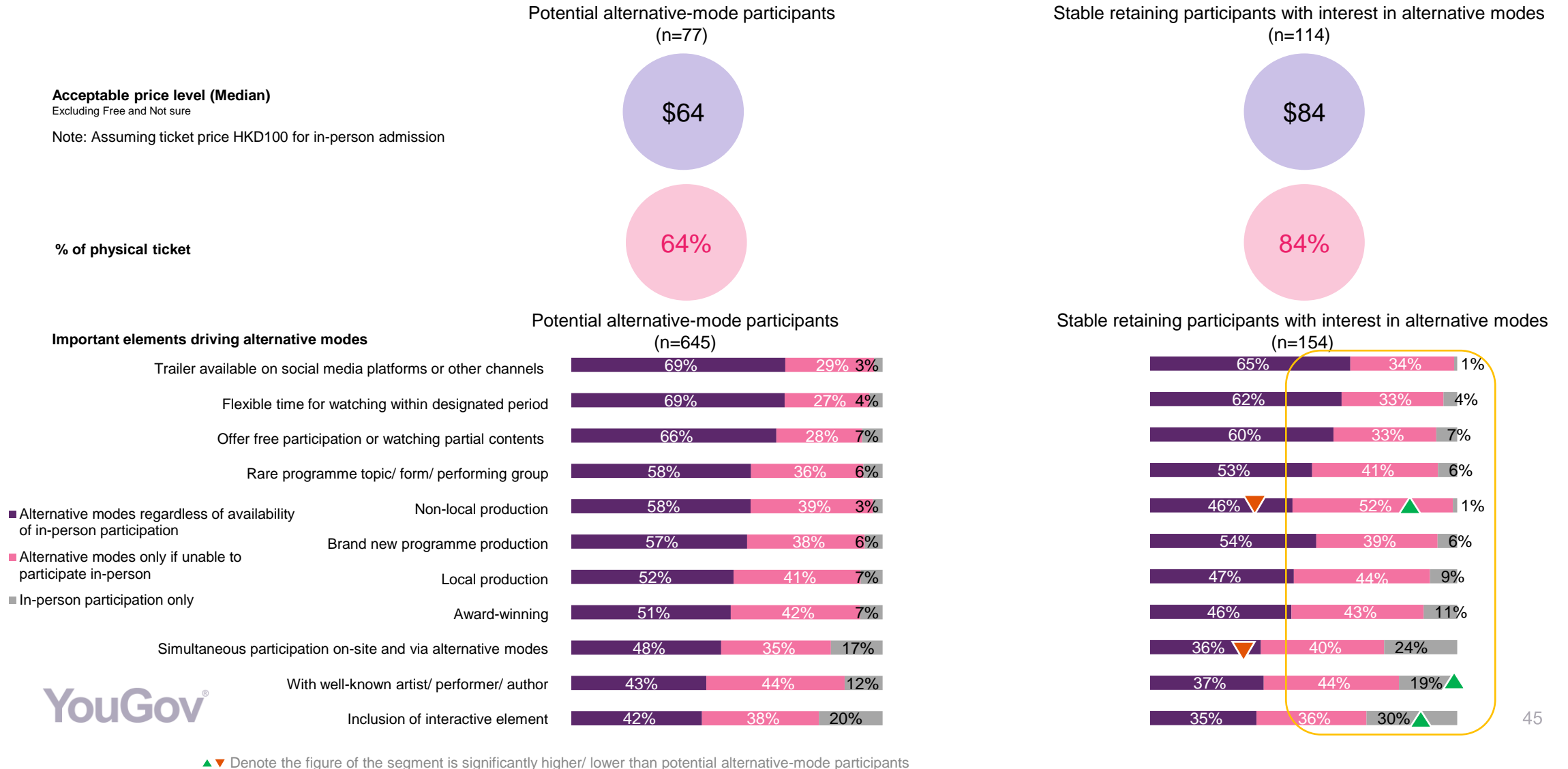


Note: These include participants in the respective period only, so they do not cover all participants in Jan 2018 – Jan 2021 and all potential participants.  
 Note: For participation frequency, respondents are asked for their average yearly participation via physical modes in 2018-2019, and their total participation via alternative modes during COVID-19.



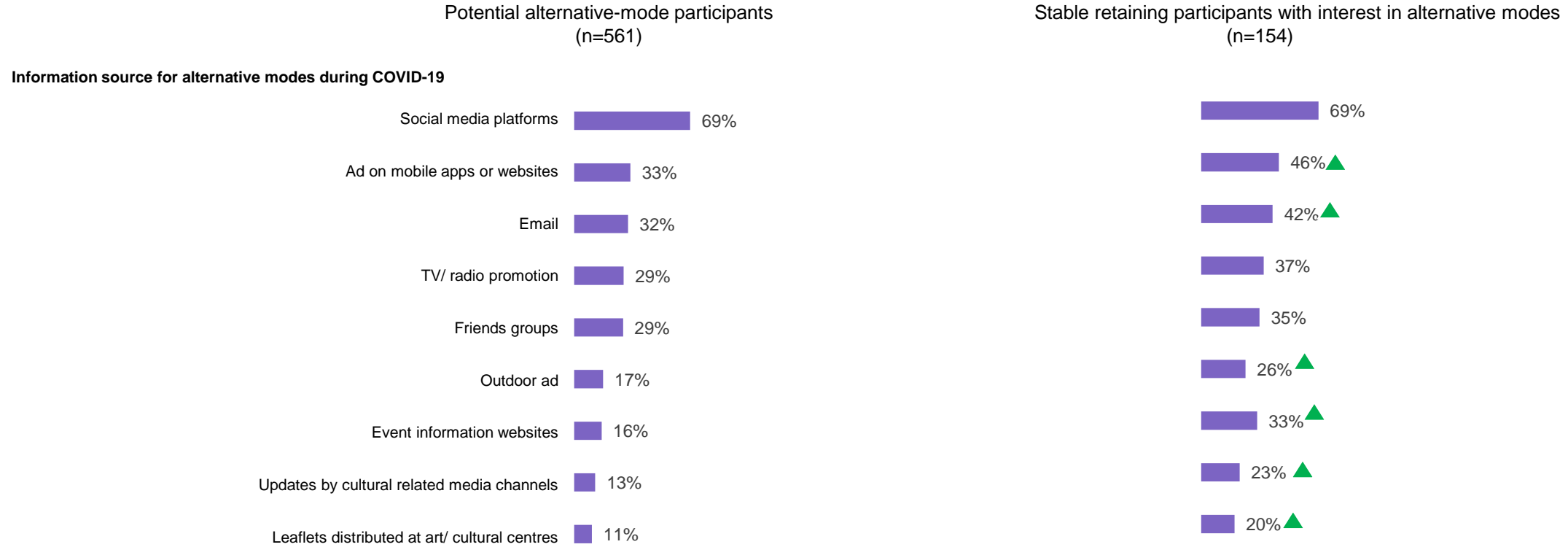
# Acceptable price level and important elements for arts participation via alternative modes at post-COVID-19 period - Stable retaining participants with participation interest at post-COVID-19 period – Film and Media Arts

- Stable retaining participants with interest were more willing to pay for alternative-mode programmes, although they would in general be more likely to consider alternative modes only when physical participation was not possible.



# Information source for alternative-mode arts programmes during COVID-19 - Stable retaining participants with participation interest at post-COVID-19 period – Film and Media Arts

- On top of social media platforms, over 40% of stable retaining participants with interest in alternative modes also received programme information from advertisements on mobile apps/ websites and emails.



Note: Those without awareness of or prior experience in alternative-mode programmes are excluded from the question on Information source, so the base does not cover all potential alternative-mode participants.

▲ ▼ Denote the figure of the segment is significantly higher/ lower than potential alternative mode participants

# **Lapsed and Non-Participants with Participation Interest at Post-COVID-19 Period**

# Distribution of potential participants by type of participants – Film and Media Arts

- Lapsed participants with interest in physical/ alternative modes
- Non-participants with interest in physical/ alternative modes

Amongst potential participants, a portion of them are lapsed participants or non-participants. The following slides will look into the reasons for not participating in 2018-2019 or during COVID-19 for these subgroups.

**Potential participants**  
 Claimed any interest at post-COVID-19 period  
 n= 1,122 (Ref: Q24a)

- Those who claimed interest in
- Physical modes (7%)
  - Alternative modes (9%)

Other observations:

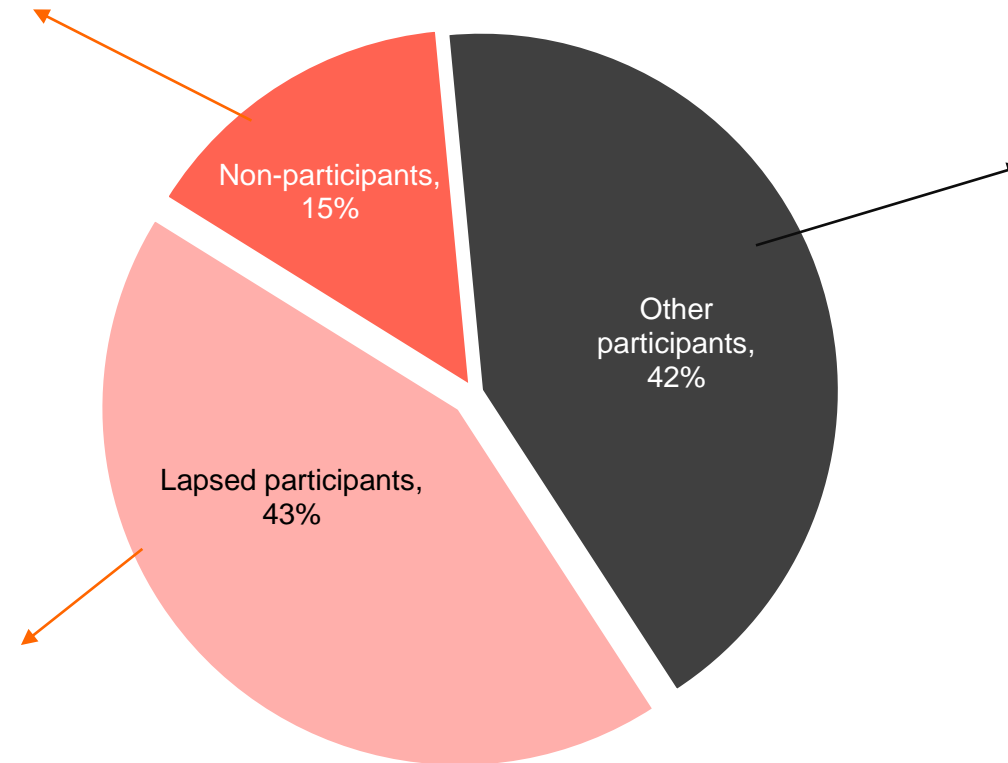
	Potential physical-mode participants	Non-participants with interest in physical modes
Aged 16-24	14%	21%
Aged 25-34	22%	12%
Aged 55-64	19%	25%
Married persons having no children aged <18	20%	36%
Married persons having children aged <18	37%	26%

	Potential alternative-mode participants	Non-participants with interest in alternative modes
Married persons having no children aged <18	23%	33%
Married persons having children aged <18	32%	19%
Secondary education or below	41%	54%
MHI below HKD 30,000	63%	74%
MHI more than HKD 50,000	14%	7%

- Those who claimed interest in
- Physical modes (29%)
  - Alternative modes (22%)

Other observations:

	Potential physical-mode participants	Lapsed participants with interest in physical modes
Retirees	3%	6%

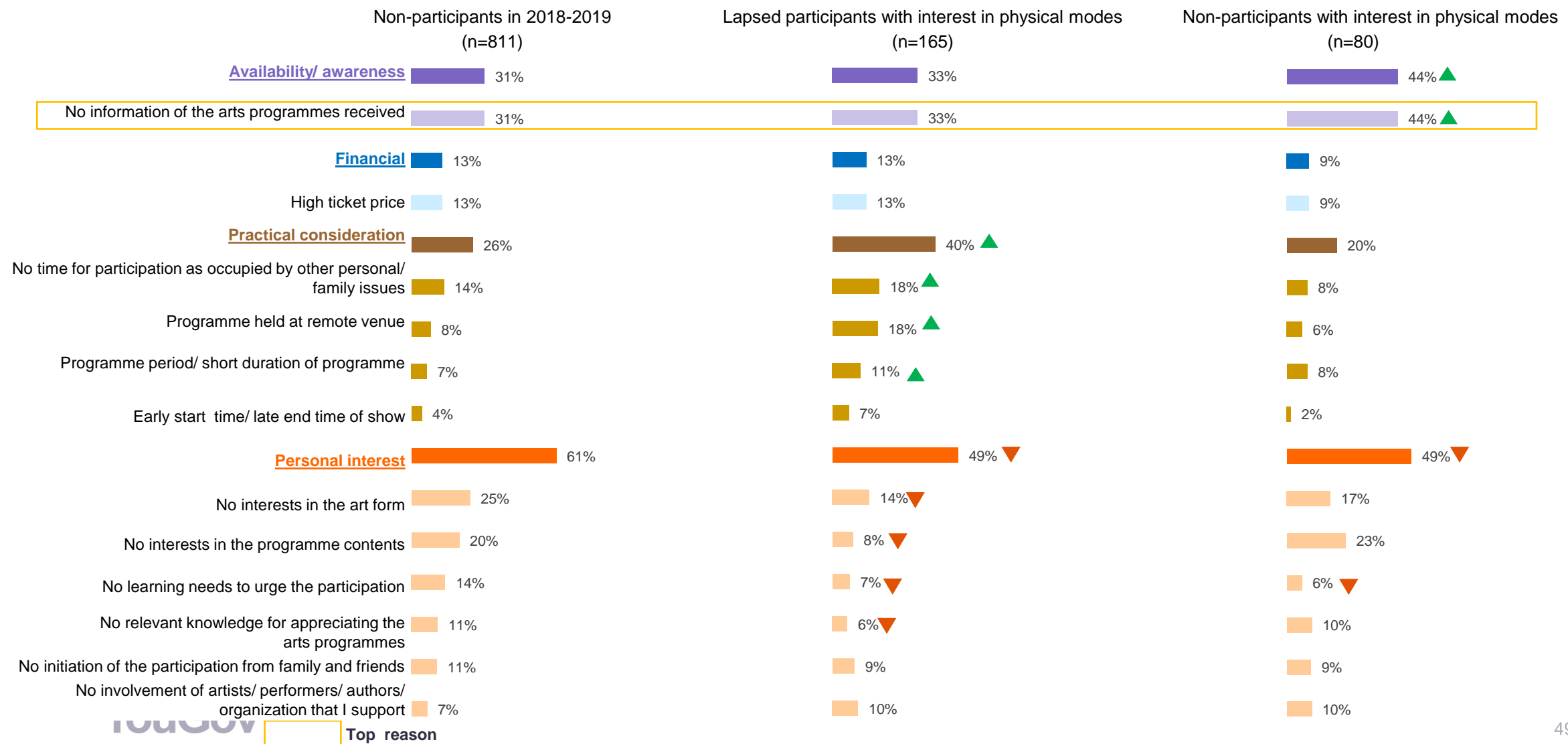


- Other participants includes:
- Retaining participants
  - Young participants
  - Returning participants
  - New participants



# Reasons for not participating in 2018-2019 - Lapsed and non-participants with participation interest at post-COVID-19 period – Film and Media Arts

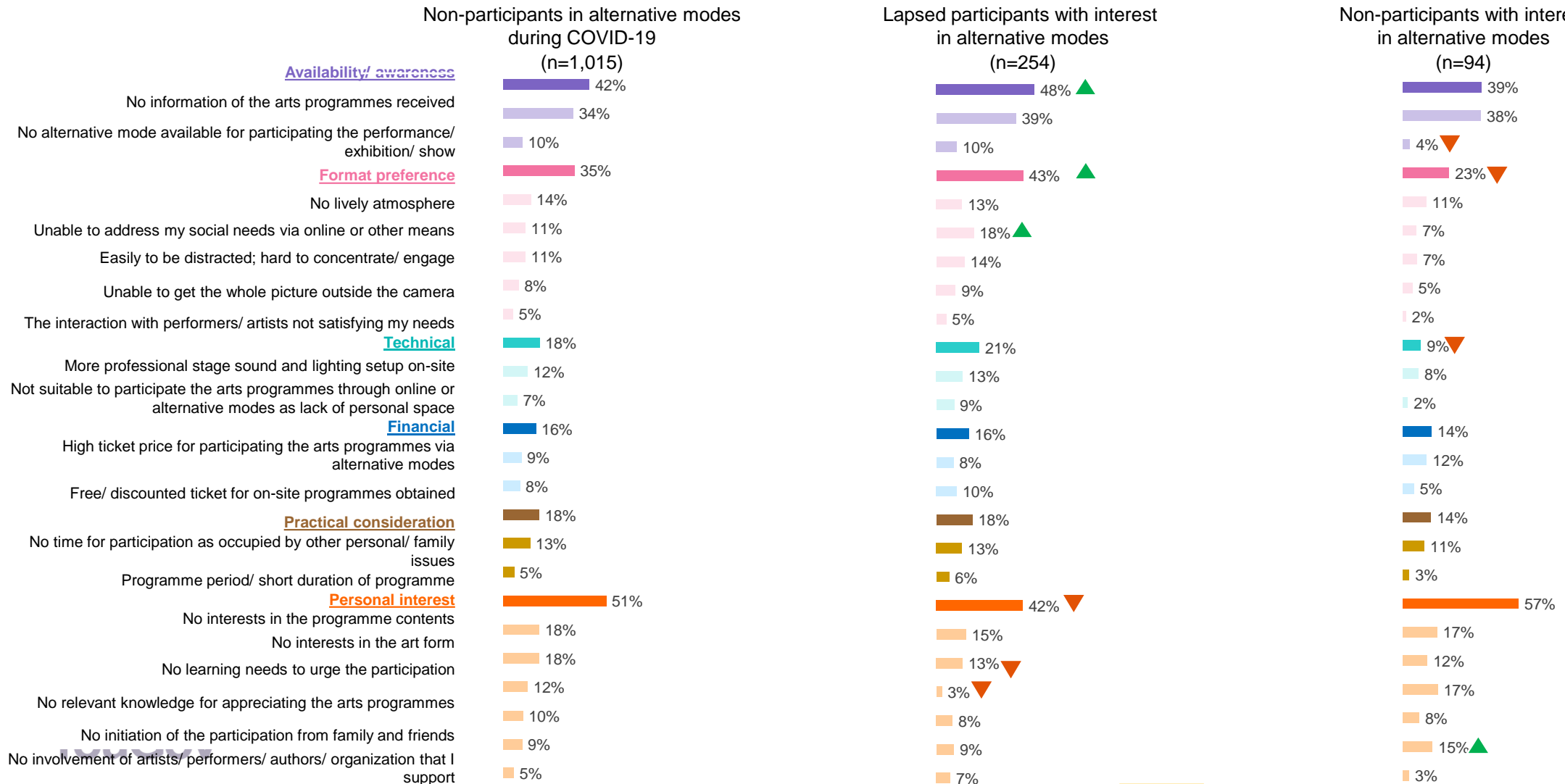
- Lack of programme information was the common reason for non-participation in 2018-2019. A significantly higher proportion of lapsed participants with interest also suggested that the programme show times or venues did not fit their schedule.



Note: Lapsed participants who have participated in 2018-2019 are excluded from this question, so not all lapsed participants with interest are covered here.  
 Base: Non-participants of Film and Media Arts programme in 2018-2019  
 ▲ ▼ Denote the figure of the segment is significantly higher/ lower than non-participants in 2018-2019

# Reasons for not participating via alternative modes during COVID-19 - Lapsed and non-participants with participation interest at post-COVID-19 period – Film and Media Arts

- Despite their claimed interest in future alternative-mode programmes, nearly 20% of lapsed participants with interest suggested that they had not participated during COVID-19 because alternative modes could not address their social needs.
- 15% of non-participants with interest also said that they had not participated during COVID-19 because no friends or family members had invited them.



Base: Non-participants of Film and Media Arts programme via alternative modes during COVID-19

▲ ▼ Denote the figure of the segment is significantly higher/ lower than the non-participants in alternative modes during COVID-19

Top reason

# Acceptable price level and important elements for arts participation via alternative modes at post-COVID-19 period - Lapsed and non-participants with participation interest at post-COVID-19 period – Film and Media Arts

• Non-participants with future interest were in general more likely to participate in alternative modes even when physical participation was possible.

