

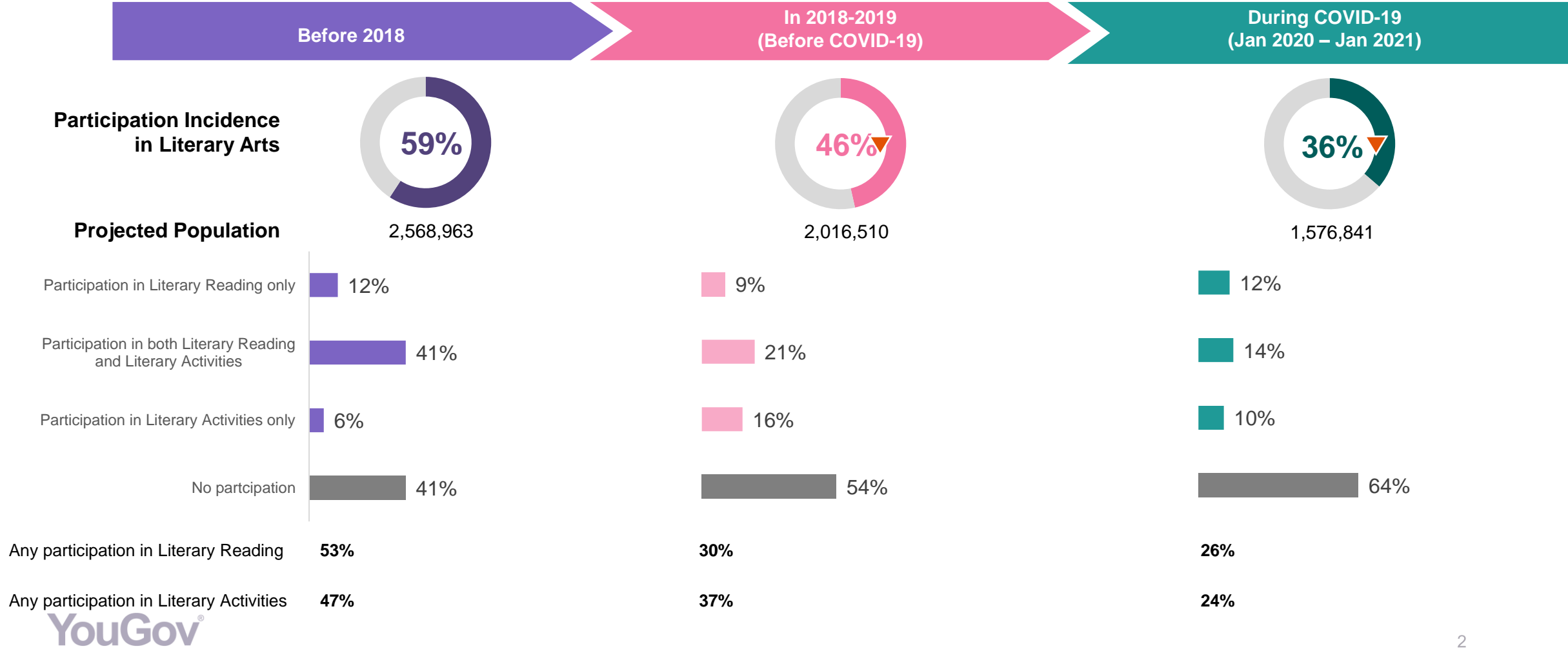
Individual Art Form Analysis – Literary Arts

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Participation in Literary Arts over time

Note to readers: Figures below covers arts participation via either physical or alternative modes; the percentage changes do not indicate any yearly comparison as the duration may not cover the whole years of 2018, 2019 and 2020

- Participation in Literary Arts experienced a considerable drop during COVID-19. Such decline was in particular more apparent for Literary Activities (from 37% to 24%) than Literary Reading (from 30% to 26%).



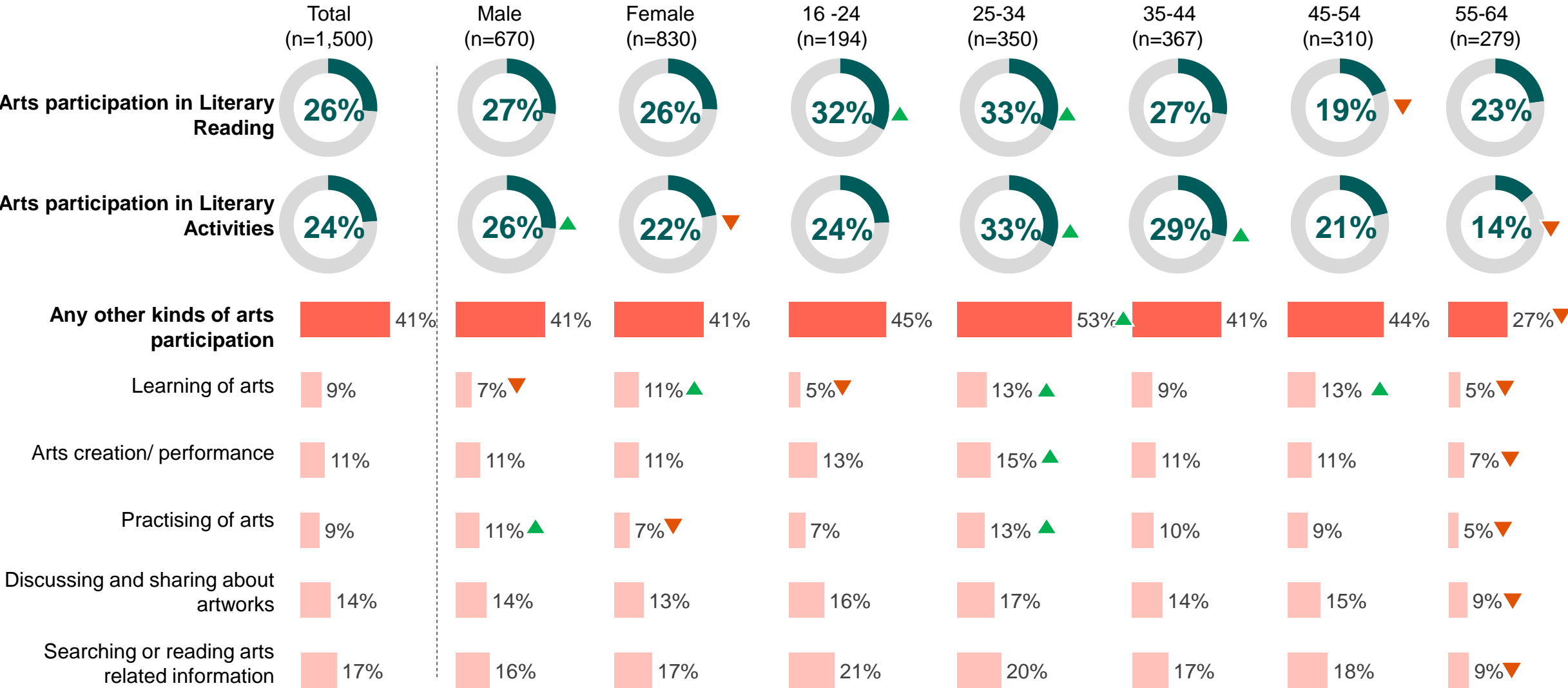
Base: All respondents, n=1,500

▲ ▼ Denote the incidence is significantly higher/ lower than the previous period



All kinds of arts participation during COVID-19 – Literary Arts – by demographics

- Those aged 25-34 had a significantly higher participation in both Literary Reading and Literary Activities, as well as in other kind of arts involvement. The participation in Literary Reading was also high for the young generation aged 16-24.



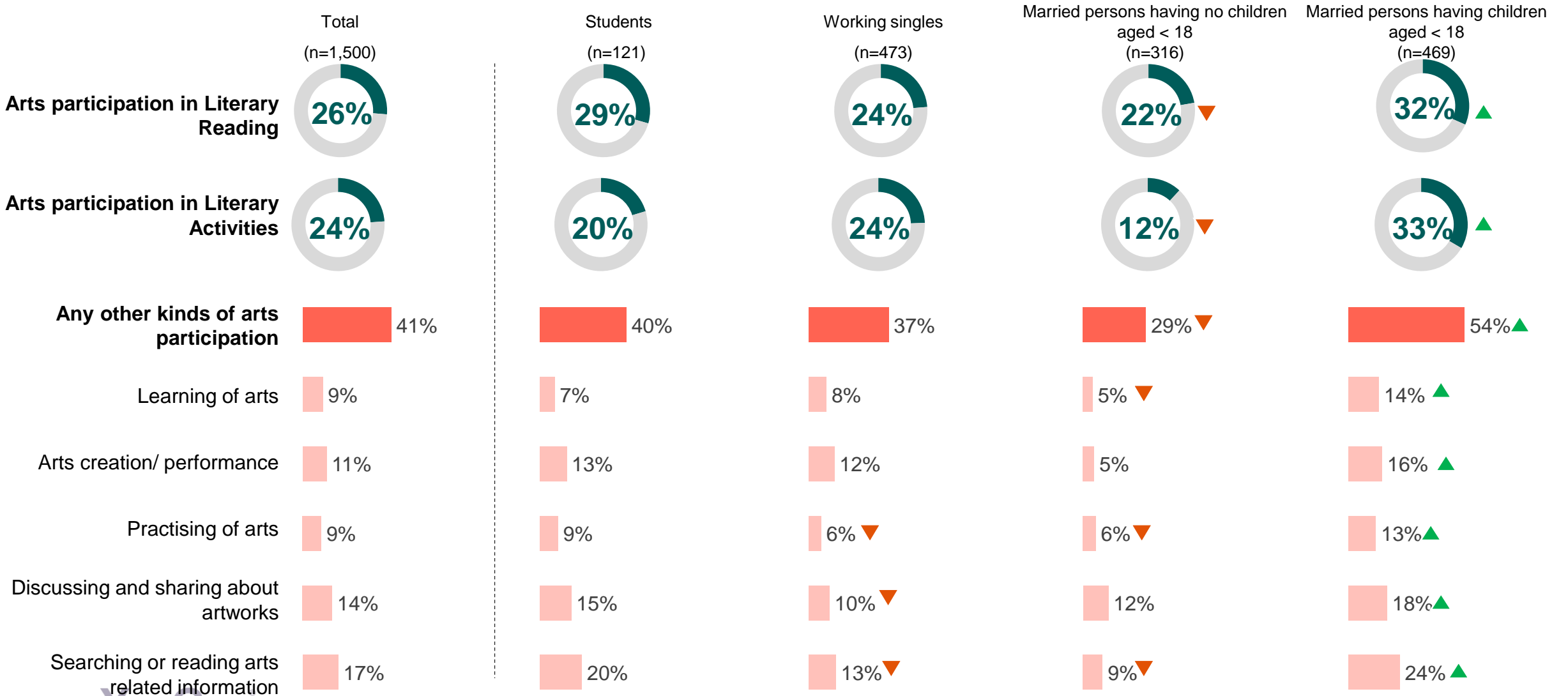
Base: All respondents, n=1,500

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

All kinds of arts participation during COVID-19 – Literary Arts – by life segments

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

- Participation in both Literary Reading and Literary Activities was strong among married persons having children under the age of 18.



Base: All respondents, n=1,500

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

Literary Reading

Note to Readers:

This section focuses on the participation behaviour and characteristics of literary readers


Key highlights

- Compared to Literary Activities and most other art forms, the impact of COVID-19 outbreak on Literary Reading participation was relatively mild (a drop from 30% to 26%). This was possibly because reading of physical literature did not rely on bricks-and-mortar venues as much as the programmes of other art forms.
- Either before or during the epidemic, there was over 40% of retaining participants who read both physical and digital literature, whereas young participants tended to read e-books only.
- Since COVID-19, e-books – especially free ones – had grown in popularity among literary readers.
- Looking at the overall participation in recent years (i.e. Jan 2018 – Jan 2021), it was found that literary readers were more skewed towards younger people aged 34 or below, and a considerable portion of them were students or married persons with young children.

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?

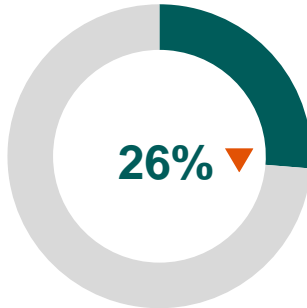
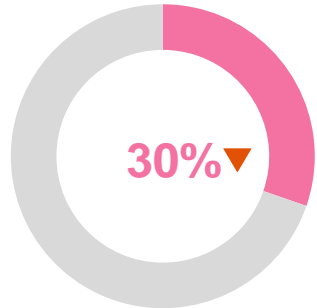
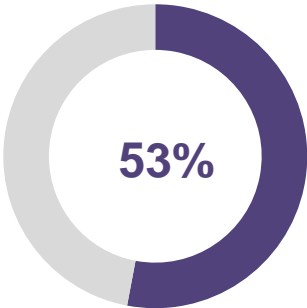
 Ever-Participation	Before 2018	In 2018-2019 (Before COVID-19)	During COVID-19 (Jan 2020 – Jan 2021)
• Retaining participants	✓	✓	✓
• Young participants		✓	✓
• Returning participants	✓		✓
• New participants			✓
• Lapsed participants since COVID-19	✓	✓	
		✓	
• Lapsed participants since 2018	✓		
• Non-participants			

Arts participation – Literary Reading

- Participation incidence in Literary Reading during COVID-19 was 4% lower than that before the epidemic, which was a relatively mild drop compared to participation in Literary Activities (see slide 18 for details).



Participation Incidence



Projected Population

2,298,363

1,314,769

1,140,488

Participation Segment

Projected Population

Participation Segment	Percentage	Projected Population
Total (n=1,500)		
Retaining participants	17%	728,864
Young participants	3%	124,651
Returning participants	5%	198,181
New participants	2%	88,794
Lapsed participants since COVID-19	11%	461,255
Lapsed participants since 2018	23%	1,005,979
Non-participants	40%	1,731,390



Base: All respondents, n=1,500

▲ ▼ Denote the incidence is significantly higher/ lower than the previous period

Profiles of arts participants – Literary Reading

Note to readers: The segment of New participants (n=20) is not shown due to small base

- While women constituted a large fraction of retaining participants, there was also over 60% of women among those lapsed participants since COVID-19.



Profiles of arts participants – Literary Reading

Note to readers: The segment of New participants (n=20) is not shown due to small base

Retaining participants
(n=267)

Young participants
(n=37*)

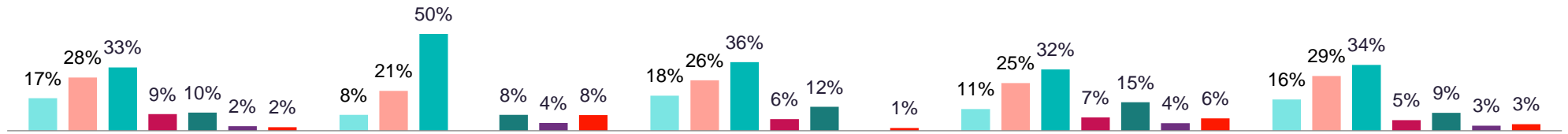
Returning participants
(n=69)

Lapsed participants since COVID-19
(n=152)

Lapsed participants since 2018
(n=358)

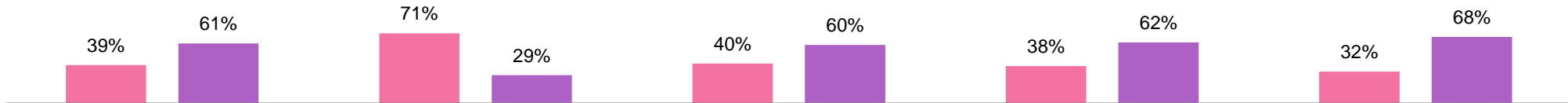
Occupation

- Business owners/ Managers and professionals
- White-collar
- Blue-collar
- Housewives
- Students
- Retiree
- Unemployed



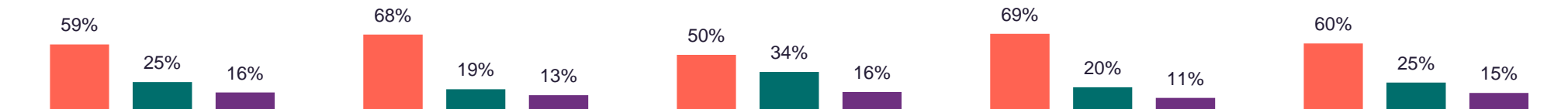
Education Level

- Secondary or below
- Post-secondary / University



Monthly Household Income

- Below HKD 30,000
- HKD 30,000 - 49,999
- HKD 50,000 or above

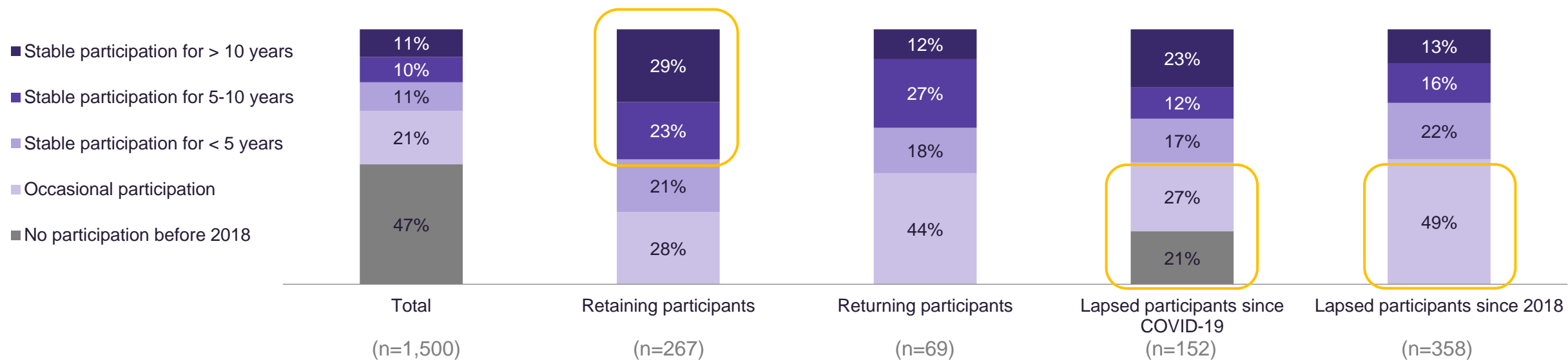


Arts participation before 2018 – Literary Reading

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

- 52% of the retaining participants were stable participants for more than 5 years.
- Among lapsed participants since COVID-19 and since 2018, nearly half only participated occasionally or had no participation before 2018.

Participation before 2018

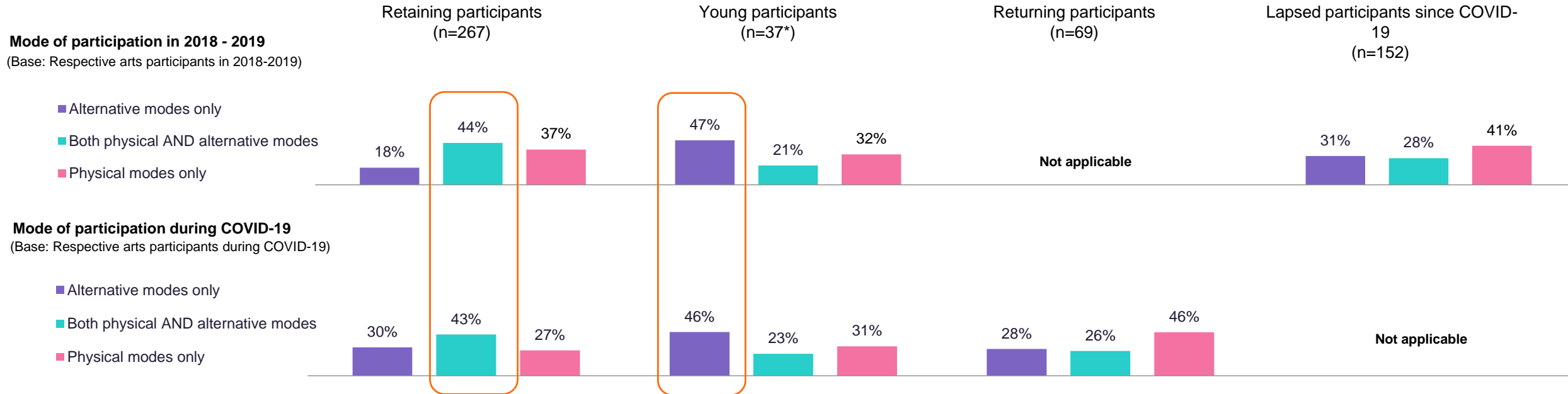


History of arts participation – Literary Reading

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=20) is not shown due to small base

- Over 40% of retaining participants read literature in both physical and digital formats. In particular, the percentage of those who read e-books only surged from 18% to 30% during COVID-19.
- Contrary to other participant segments, more young participants tended to read e-books only both before and during COVID-19.

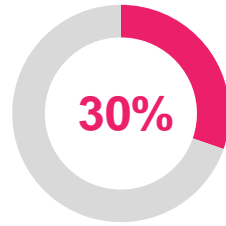
History of Arts Participation



Mode of participation among arts participants – Literary Reading

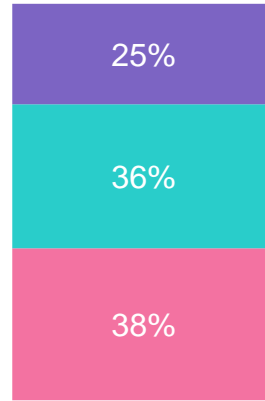
- Reading physical literature (whether already available at home, recently purchased, or borrowed from library) was the dominant participation mode in 2018-2019, but e-books (either paid or free ones available at e-library, apps or other online channels) have grown in popularity since COVID-19.

Participation Incidence (n=1,500)

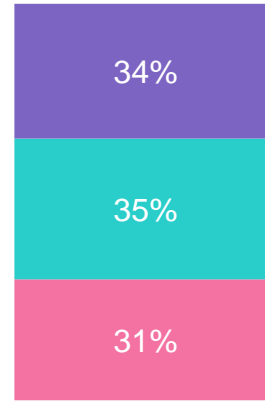
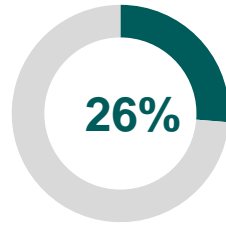


Mode of participation among participants

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



In 2018 – 2019
(n=456)



During COVID-19
(n=393)

Projected Population

Mode of Participation

Alternative modes only	332,847
Both physical AND alternative modes	478,350
Physical modes only	503,572

332,847
478,350
503,572

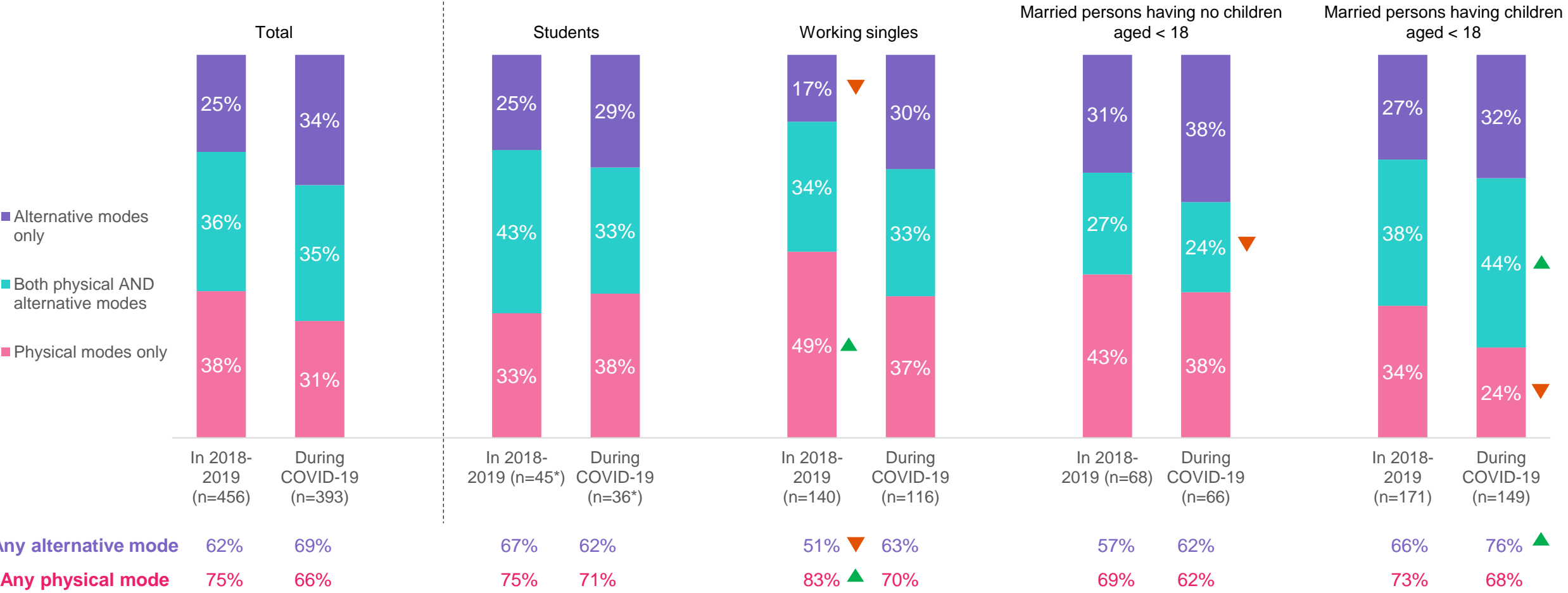
387,645
404,600
348,243

	In 2018 – 2019 (n=456)	During COVID-19 (n=393)
Any physical mode	75%	66%
Purchase physical literature from store in-person or by online ordering	39%	28%
Read physical literature already at home	43%	44%
Borrow physical literature from library in-person	38%	21%
Any alternative mode	62%	69%
Designated official websites	18%	22%
Paid e-books via e-library, apps or other online channels	30%	35%
Free e-books via e-library, apps or other online channels	23%	32%
Via other online channels	14%	18%

Mode of participation among arts participants – Literary Reading – by life segments

Note to readers: The segment of retirees (n=7 in 2018-2019, n=4 during COVID-19) is not shown due to small base

- Comparatively, more married persons having children under the age of 18 read e-books during COVID-19.
- More working singles switch from reading physical literature to e-books during COVID-19.



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

Profiles of participants in Jan 2018 – Jan 2021 – Literary Reading

- Literary readers in Jan 2018 – Jan 2021 were more skewed towards younger people aged 34 or below, and a considerable portion of them were students or married persons with young children.

	Total (n=1,500)	Participants in Jan 2018 – Jan 2021 (n=545)
Male	44%	43%
Female	56%	57%
16-24	13%	17% ▲
25-34	20%	23% ▲
35-44	22%	23% ▼
45-54	22%	19%
55-64	23%	18%
Business owners/ Managers and professionals	14%	14%
White-collar	27%	25%
Blue-collar	34%	36%
Housewives	7%	7%
Students	9%	12% ▲
Retirees	3%	3%
Unemployed	5%	4%
Students	9%	12% ▲
Working singles	22%	20%
Married persons having no children aged < 18	24%	18% ▼
Married persons having children aged < 18	32%	38% ▲
Secondary or below	45%	43%
Post-secondary / University	55%	57%
Below HKD 30,000	64%	63%
HKD 30,000 - 49,999	24%	24%
More than HKD 50,000	12%	14%

	Total (n=1,500)	Participants in Jan 2018 – Jan 2021 (n=545)
Region & living district		
Hong Kong Island	17%	19% ▲
Central & Western	3%	3%
Eastern	8%	11% ▲
Southern	4%	4%
Wan Chai	2%	2%
Kowloon	30%	30%
Kowloon City	6%	7%
Kwun Tong	8%	9%
Sham Shui Po	6%	7%
Wong Tai Sin	6%	3% ▼
Yau Tsim Mong	4%	4%
New Territories	53%	51%
Kwai Tsing	7%	8%
North	5%	6%
Sai Kung	7%	6%
Sha Tin	8%	7%
Tai Po	4%	4%
Tsuen Wan	4%	3% ▼
Tuen Mun	8%	7%
Yuen Long	8%	6%
Islands	3%	4% ▲

Literary Activities

Note to Readers:

This section focuses on the participation behaviour and characteristics of literary activity participants

Key highlights

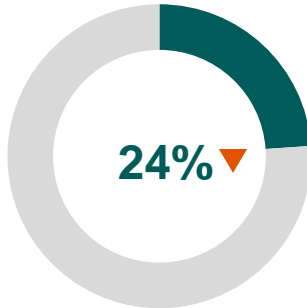
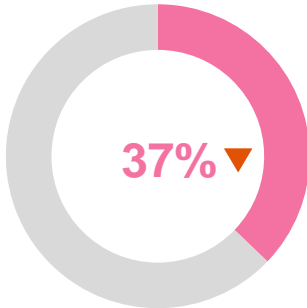
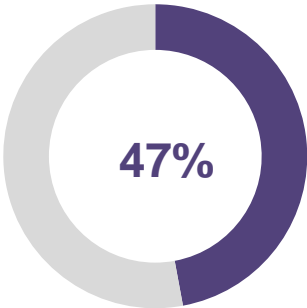
- Participation in Literary Activities declined from 37% in 2018-2019 to 24% during COVID-19. In particular, female participation in Literary Activities dropped more significantly during COVID-19. Young adults aged 25-34 and married persons having children aged under 18 had been most active in participation both before and during the epidemic, and they were also more eager to participate in the art form at post-COVID-19 period.
- More than half of the “lapsed participants since COVID-19” had only participated in physical Literary Activities 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 56% in 2018-2019 to 93% during COVID-19. The popularity growth was particularly prominent for video conferencing apps, social media platforms and designated official websites.
- Compared to physical-mode participation before the epidemic, alternative-mode participation in Literary Activities during COVID-19 was notably more frequent and involved more free programmes and those featuring non-local authors.
- Claimed interest (53%) in future Literary Activities was significantly higher than the actual participation incidence (42%) in recent years, and such interest was mainly towards physical programmes at post-COVID-19 period. Nonetheless, students shown a clear preference for future participation in alternative modes even though they were more involved in physical programmes before and during COVID-19.
- Both actual participants in Jan 2018 – Jan 2021 and potential participants at post-COVID-19 period were skewed towards young adults aged 25-34, business owners/ managers / professionals and married persons having children. They tended to be more educated and have higher household income.
- Over 60% of potential Literary Activity participants were lapsed participants or non-participants. Among them, over 30% suggested that they had not participated in the art form in 2018-2019 or during COVID-19 because they had not received information on the arts programmes. Hence, more effort would be needed to disseminate programme information to potential participants through more effective channels such as social media platforms.

Arts participation – Literary Activities

- Participation in Literary Activities dropped drastically from 37% in 2018-2019 to 24% during COVID-19.
- 18% of previous Literary Activity participants had lapsed since COVID-19, the highest among all art forms.



Participation Incidence



Projected Population

2,042,850

1,613,030

1,037,640

Participation Segment

Participation Segment	Total (n=1,500)	Projected Population
Retaining participants	16%	691,843
Young participants	3%	144,970
Returning participants	3%	146,281
New participants	1%	545,45
Lapsed participants since COVID-19	18%	776,217
Lapsed participants since 2018	15%	653,104
Non-participants	43%	1,872,152

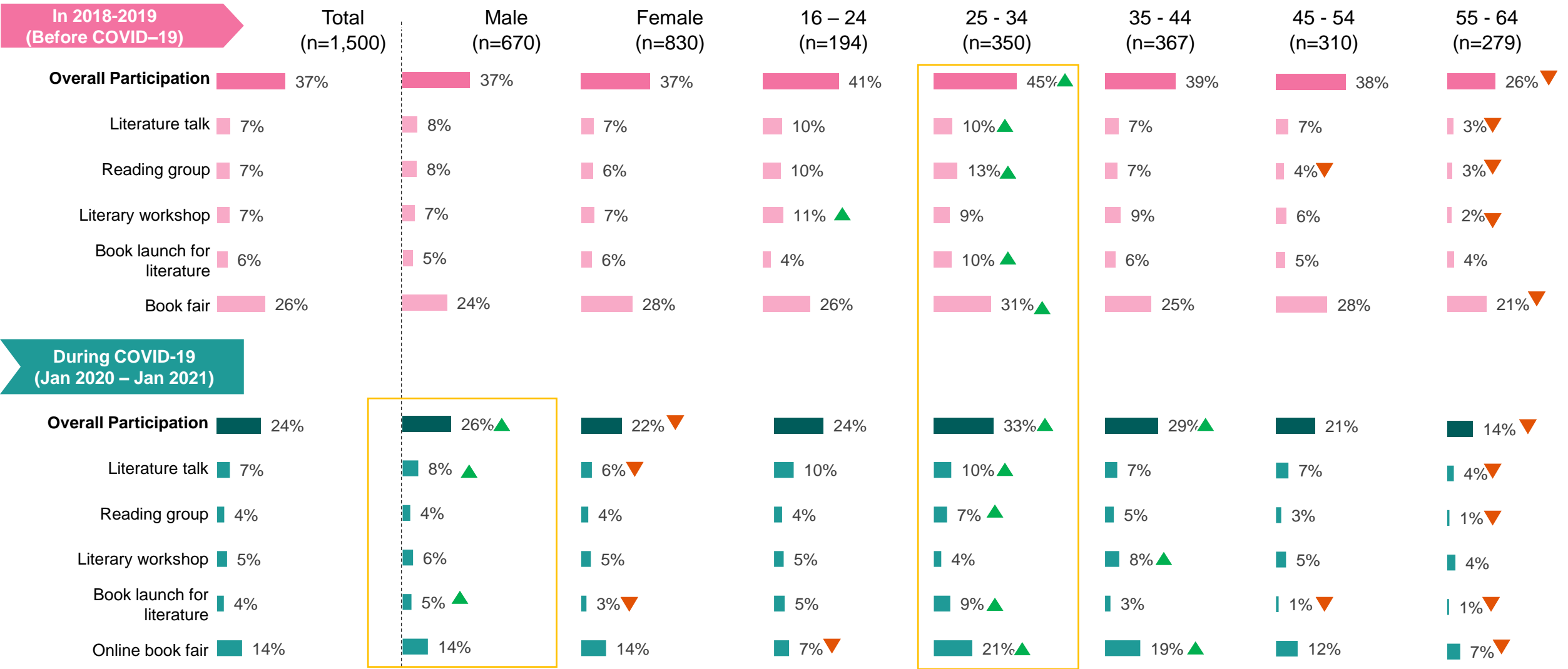


Base: All respondents, n=1,500

▲ ▼ Denote the incidence is significantly higher/ lower than the previous period

Participation in Literary Activities over time – by demographics

- Compared to men, women were more affected by COVID-19 in terms of their participation in Literary Activities.
- Young adults aged 25-34 were the most active participants in Literary Activities both before and during COVID-19.



Base: All respondents, n=1,500

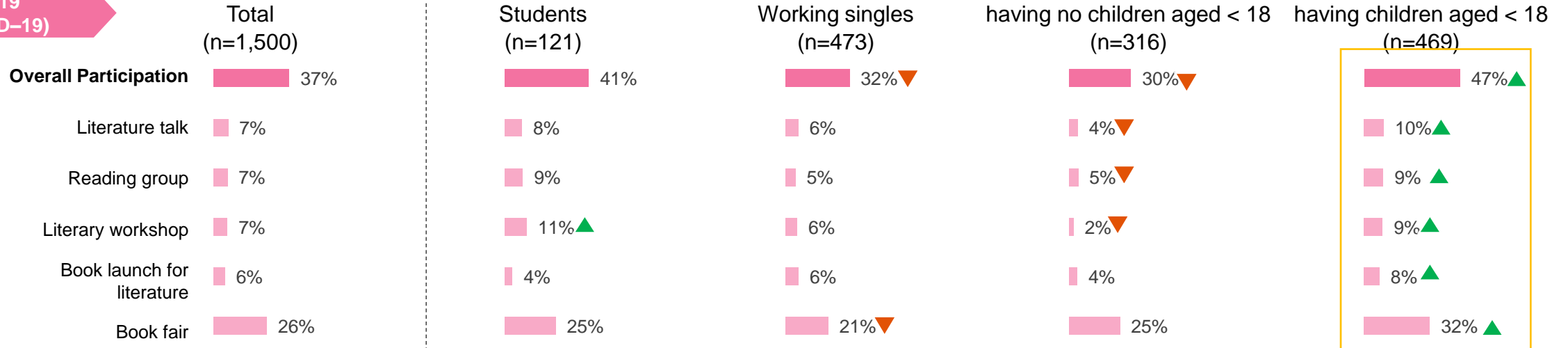
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Participation in Literary Activities over time – by life segments

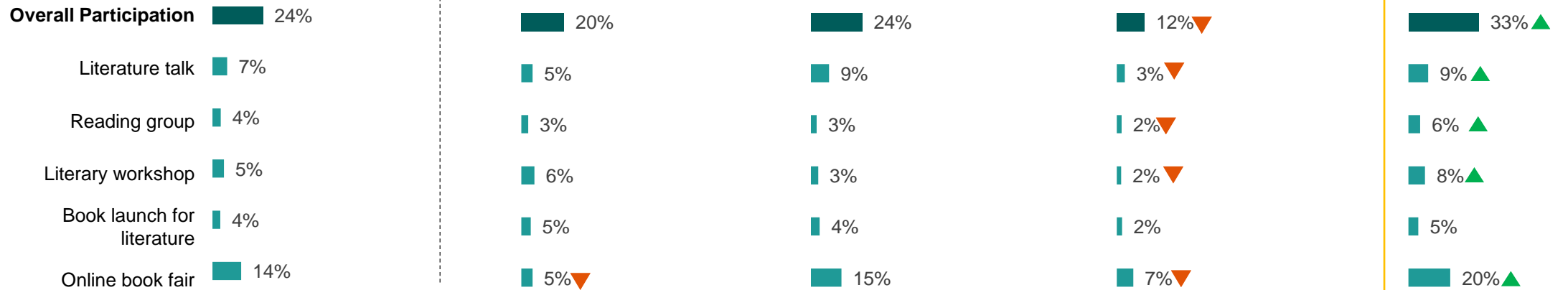
Note to readers: The segment of retirees is not shown due to small base (n=26)

- Married persons having young children had a higher participation incidence both before and during the epidemic.

In 2018-2019
(Before COVID-19)



During COVID-19
(Jan 2020 – Jan 2021)



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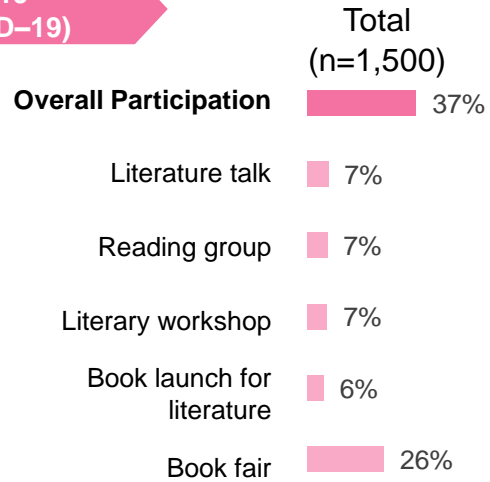
Base: All respondents, n=1,500

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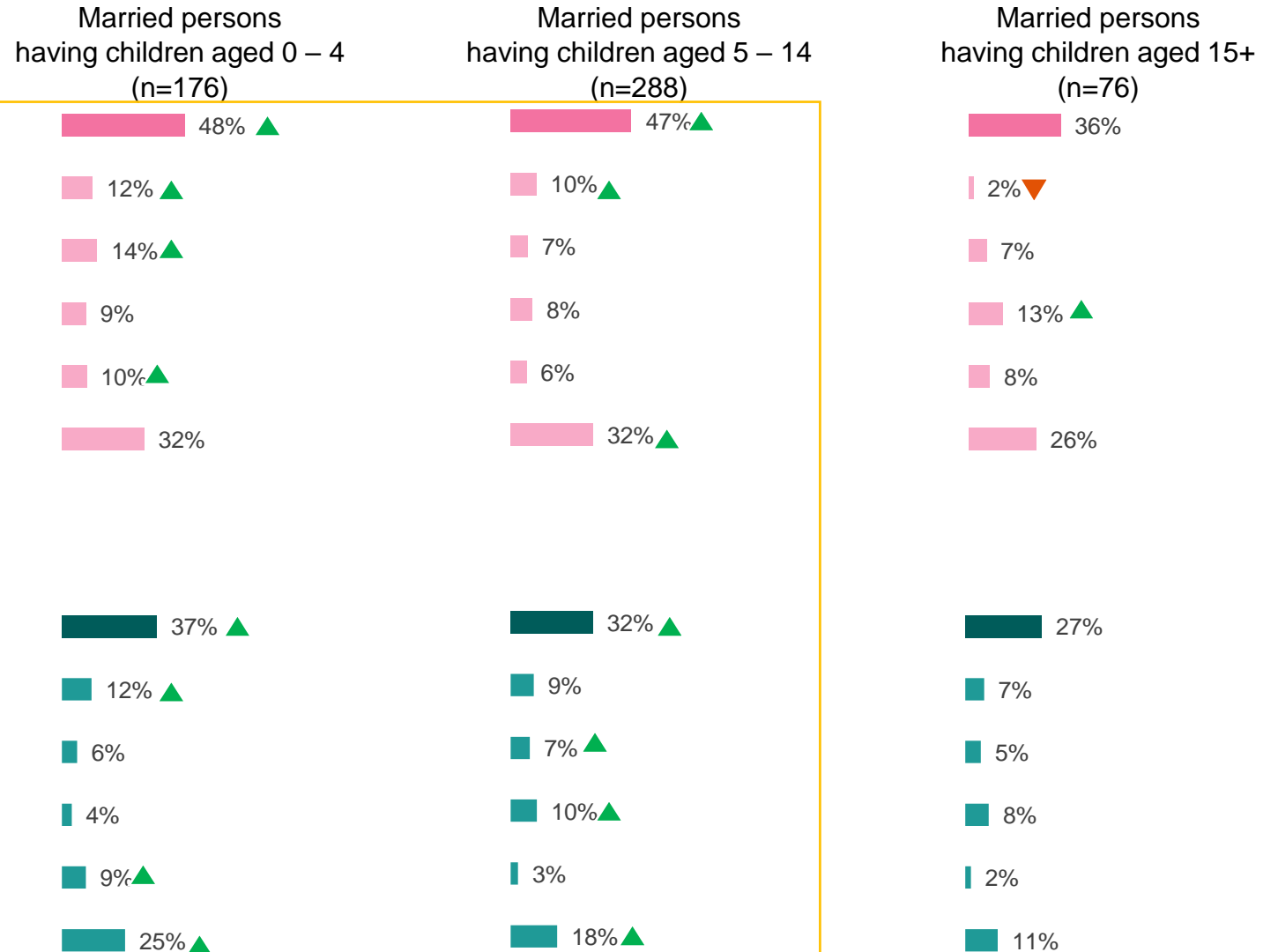
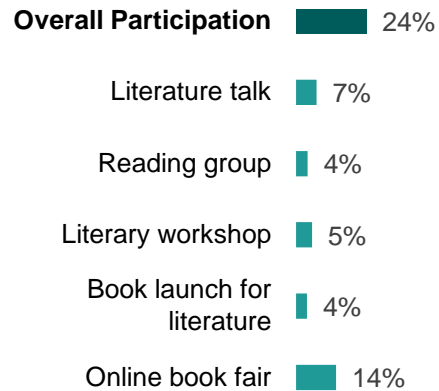
Participation in Literary Activities over time – by life segments

- Among married persons having children, the participation was relatively stronger with those having younger kids aged 14 or below.

In 2018-2019
(Before COVID-19)



During COVID-19
(Jan 2020 – Jan 2021)



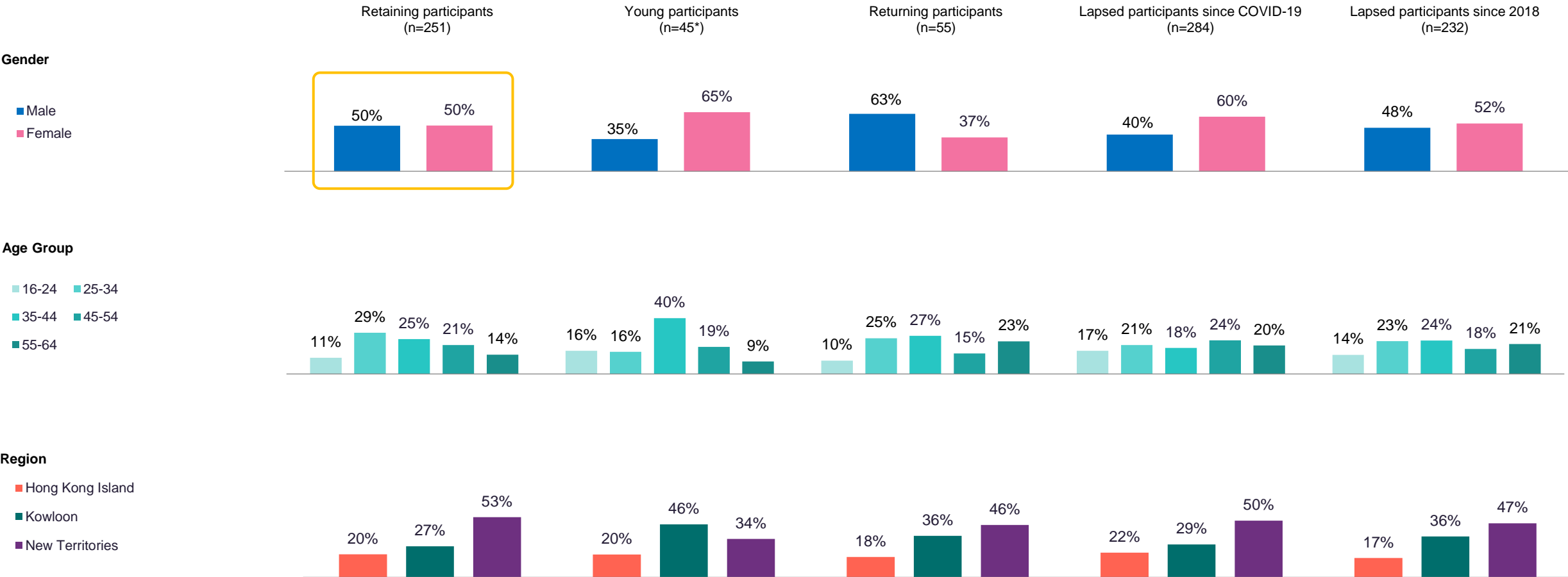
Base: All respondents, n=1,500

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Profiles of arts participants – Literary Activities

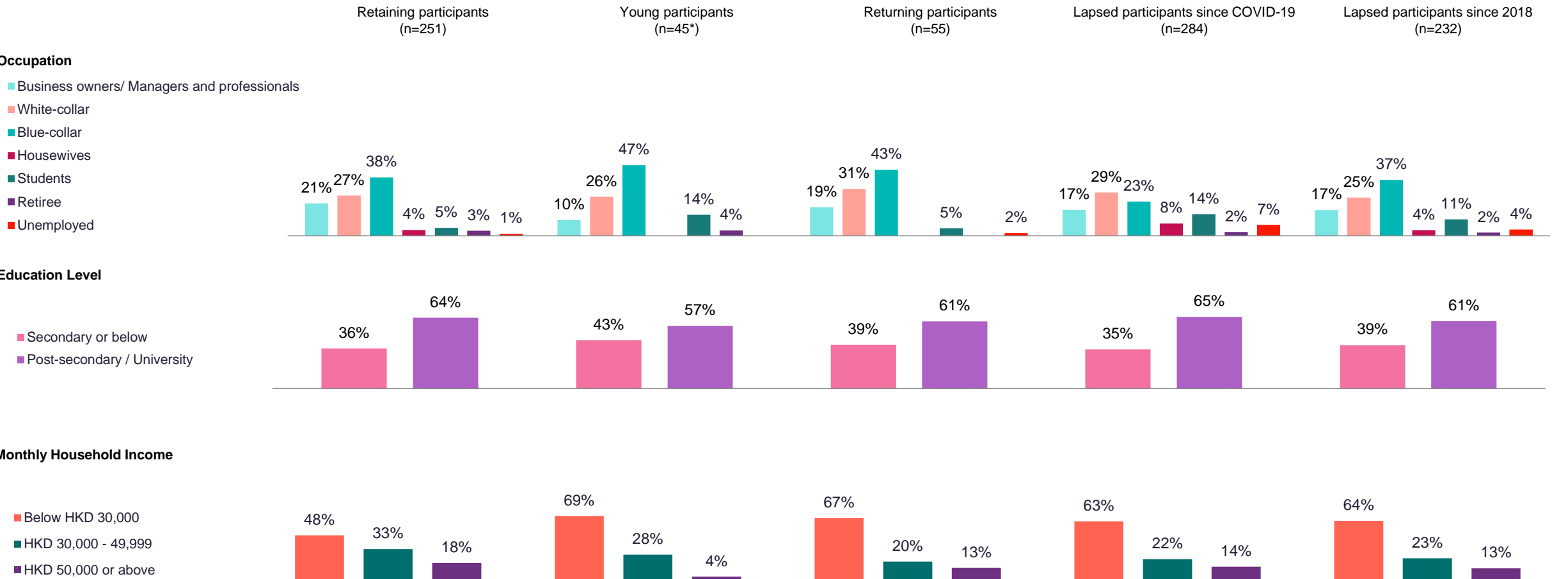
Note to readers: The segment of New participants (n=20) is not shown due to small base

- Unlike in Literary Reading where the majority of retaining participants were women, retaining participants in Literary Activities were equally distributed between both genders.



Profiles of arts participants – Literary Activities

Note to readers: The segment of New participants (n=20) is not shown due to small base

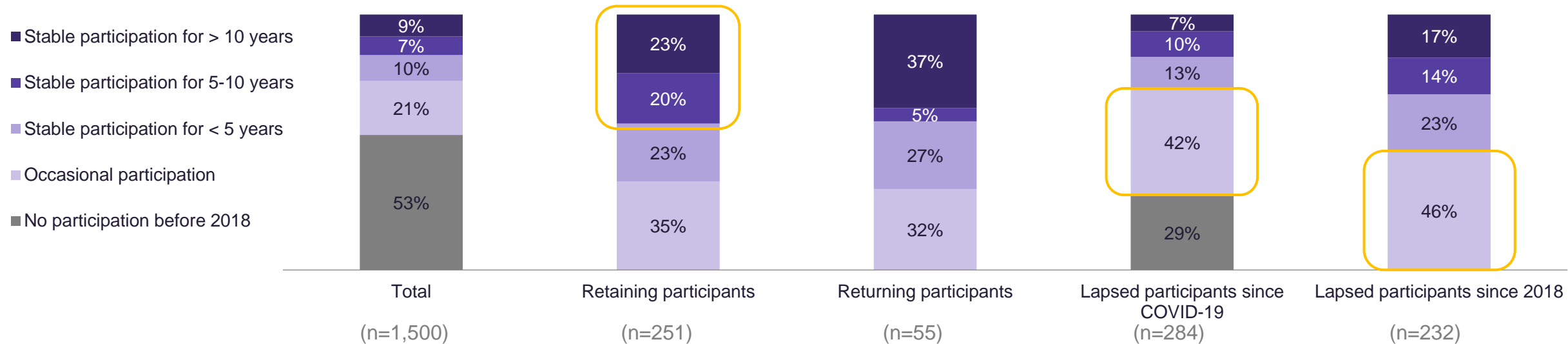


Arts participation before 2018 – Literary Activities

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

- 43% of retaining participants were stable participants for over 5 years before 2018.
- On the other hand, over 40% of lapsed participants since COVID-19 and since 2018 participated occasionally before 2018.

Participation before 2018

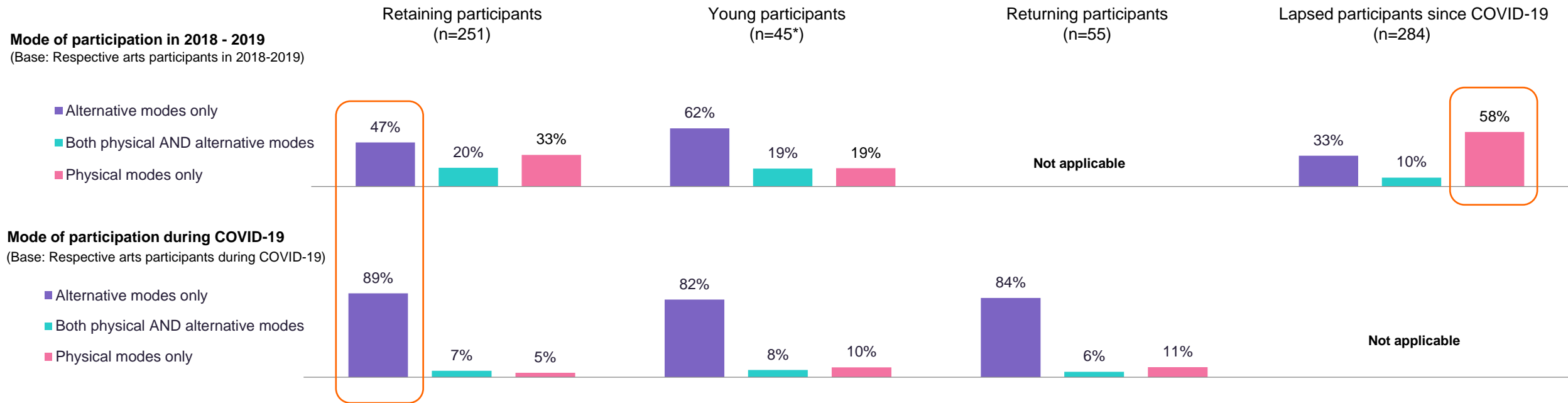


History of arts participation – Literary Activities

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=20) is not shown due to small base

- Among retaining participants, the participation incidence in alternative modes only had surged from 47% to 89% during COVID-19.
- More than half of lapsed participants since COVID-19 had only participated in physical Literary Activities in 2018-2019. The lower availability of physical programmes during COVID-19 might be a reason why they ceased participation.

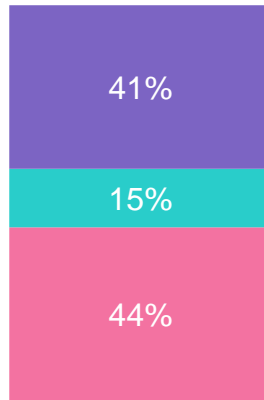
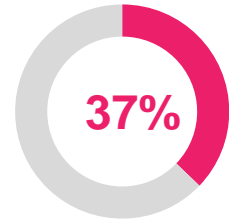
History of Arts Participation



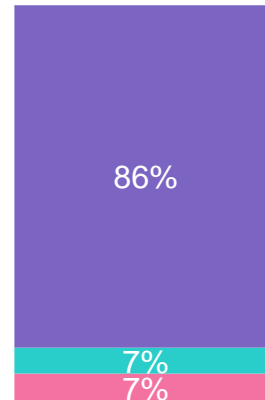
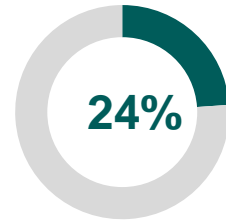
Mode of participation among arts participants – Literary Activities

- Participation in alternative modes grew from 56% in 2018-2019 to 93% during COVID-19, while physical participation dropped significantly from 59% to 14%.
- The popularity growth was particularly prominent for video conferencing apps, social media platforms and designated official websites.

Participation Incidence (n=1,500)



In 2018 – 2019
(n=580)



During COVID-19
(n=371)

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

Projected Population

Mode of Participation

Mode of Participation	In 2018 – 2019 (n=580)	During COVID-19 (n=371)
Alternative modes only	665,449	896,261
Both physical AND alternative modes	238,690	68,249
Physical modes only	708,891	73,130

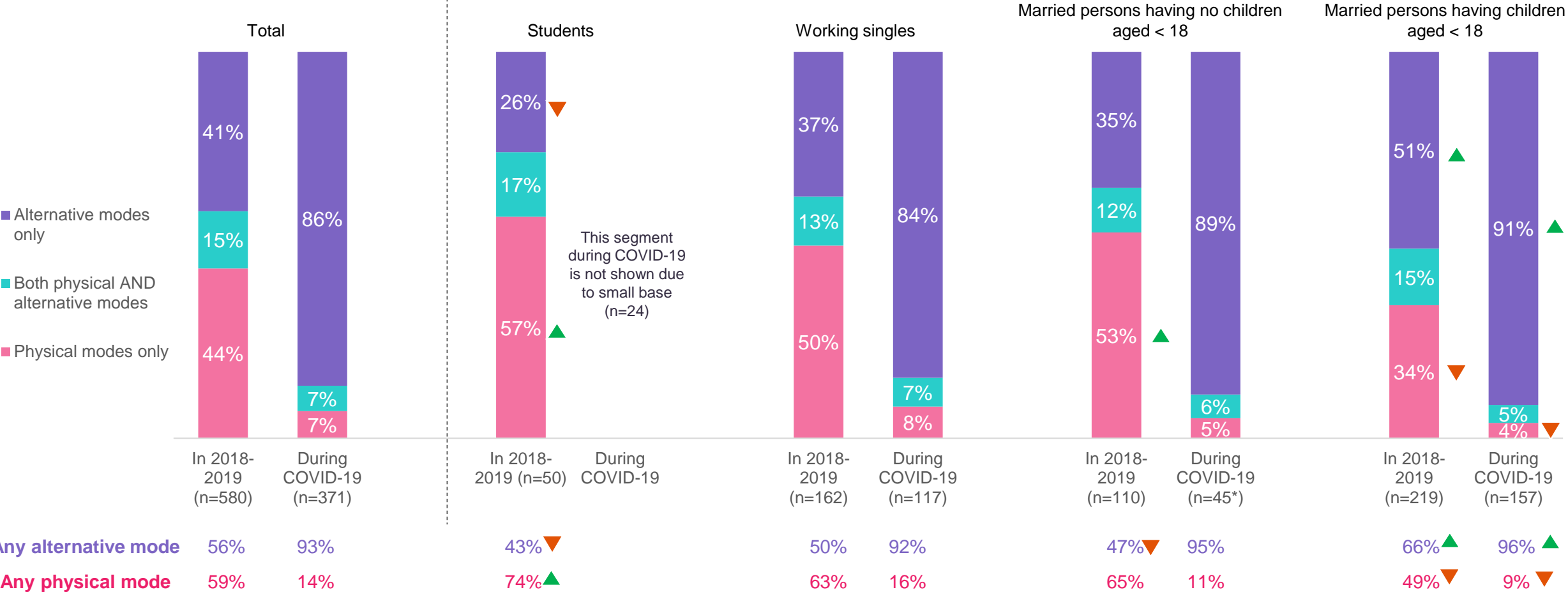


	In 2018 – 2019 (n=580)	During COVID-19 (n=371)
In-person admission	59%	14%
Any alternative mode	56%	93%
Social media platforms (e.g. Facebook, YouTube)	36%	56%
Video conferencing app	13%	36%
Designated official websites	20%	31%
Via other online channels	9%	13%

Mode of participation among arts participants – Literary Activities – by life segments

Note to readers: The segment of retirees (n=8 in 2018-2019, n=5 during COVID-19) is not shown due to small base

- Married persons having children under 18 had been more involved in alternative-mode Literary Activities even before COVID-19 outbreak. This might explain why they could maintain a relatively higher participation rate than the other life segments during the epidemic.



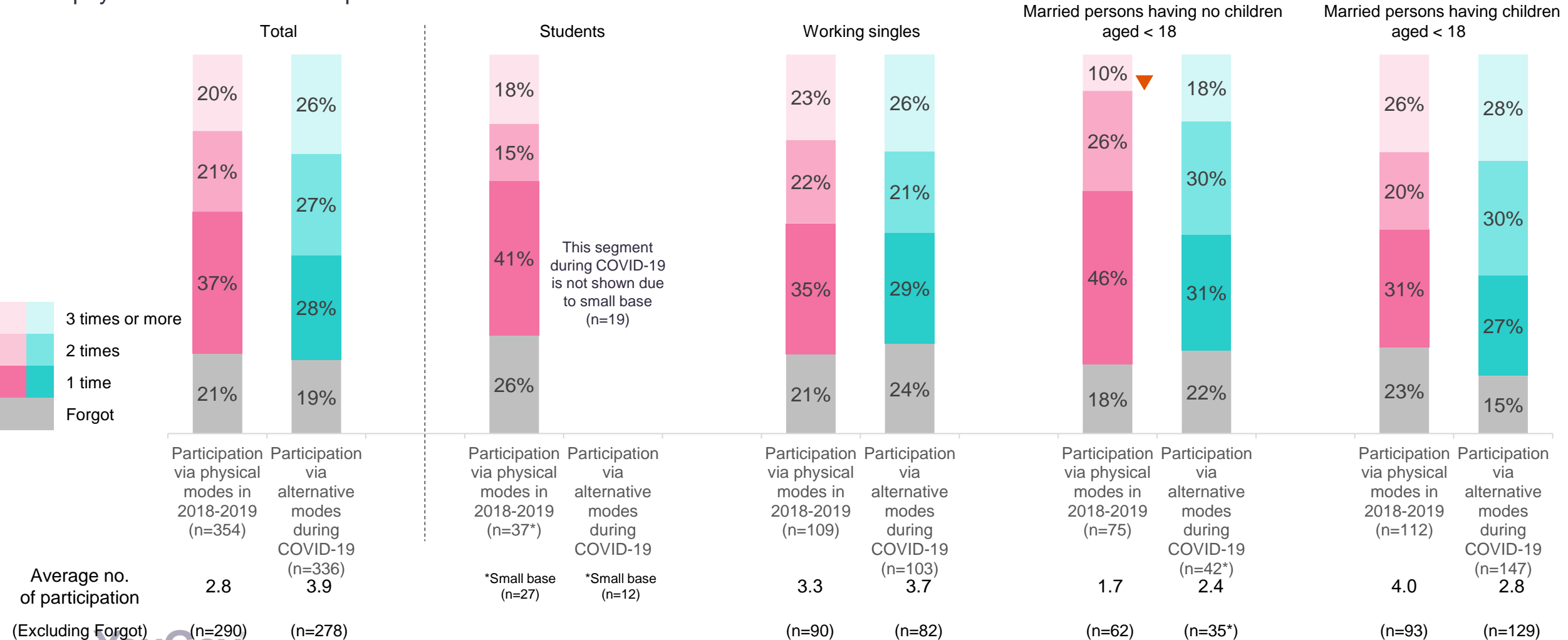
Base: Arts participants of respective art form in 2018-2019 and those during COVID-19

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

Changing frequency from physical to alternative modes – Literary Activities

Note to readers: The segment of retirees (n=8 in 2018-2019, n=5 during COVID-19) is not shown due to small base

- Compared to physical-mode participation in 2018-2019, alternative-mode participation in Literary Activities during COVID-19 was in general more frequent, except for married persons having children who participated in fewer alternative-mode programmes during COVID-19 than physical ones before the epidemic.



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.

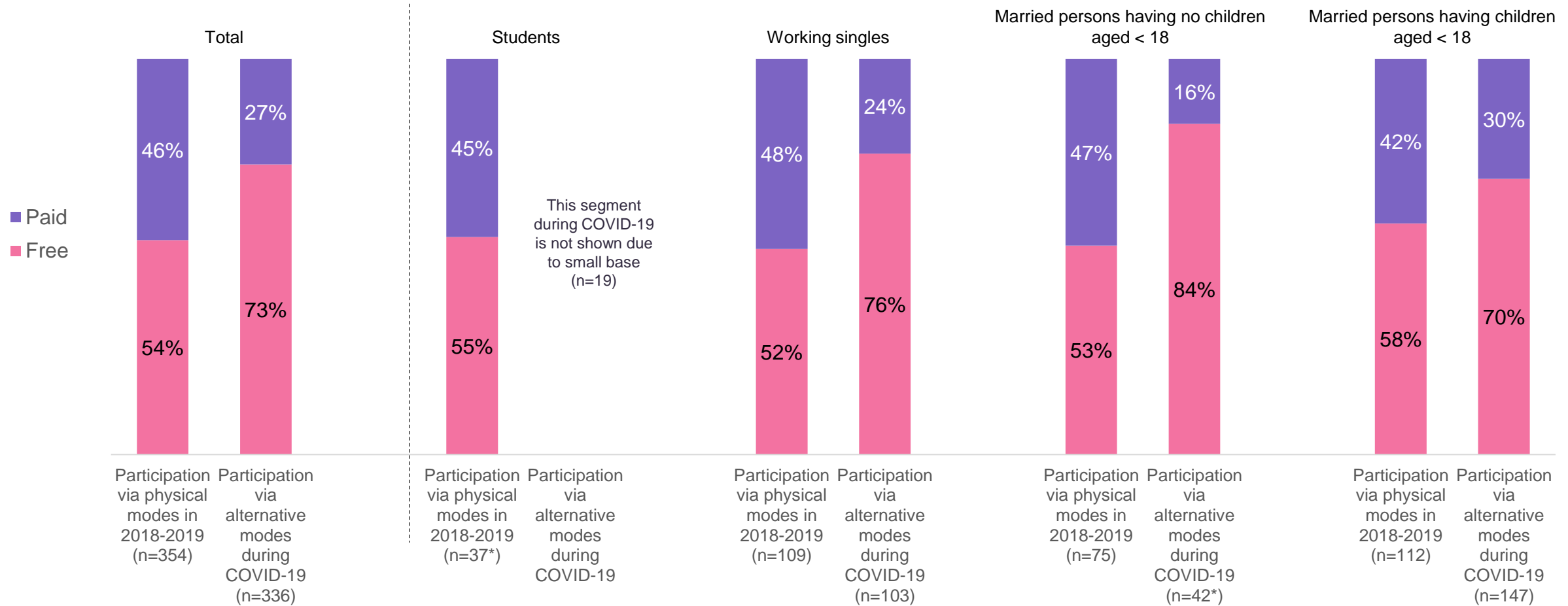
Base: Physical-mode participants of respective art form in 2018-2019, and alternative-mode participants of respective art form during COVID-19

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

Average ratio of participating free/ paid arts programmes – Literary Activities

Note to readers: The segment of retirees (n=8 in 2018-2019, n=5 during COVID-19) is not shown due to small base

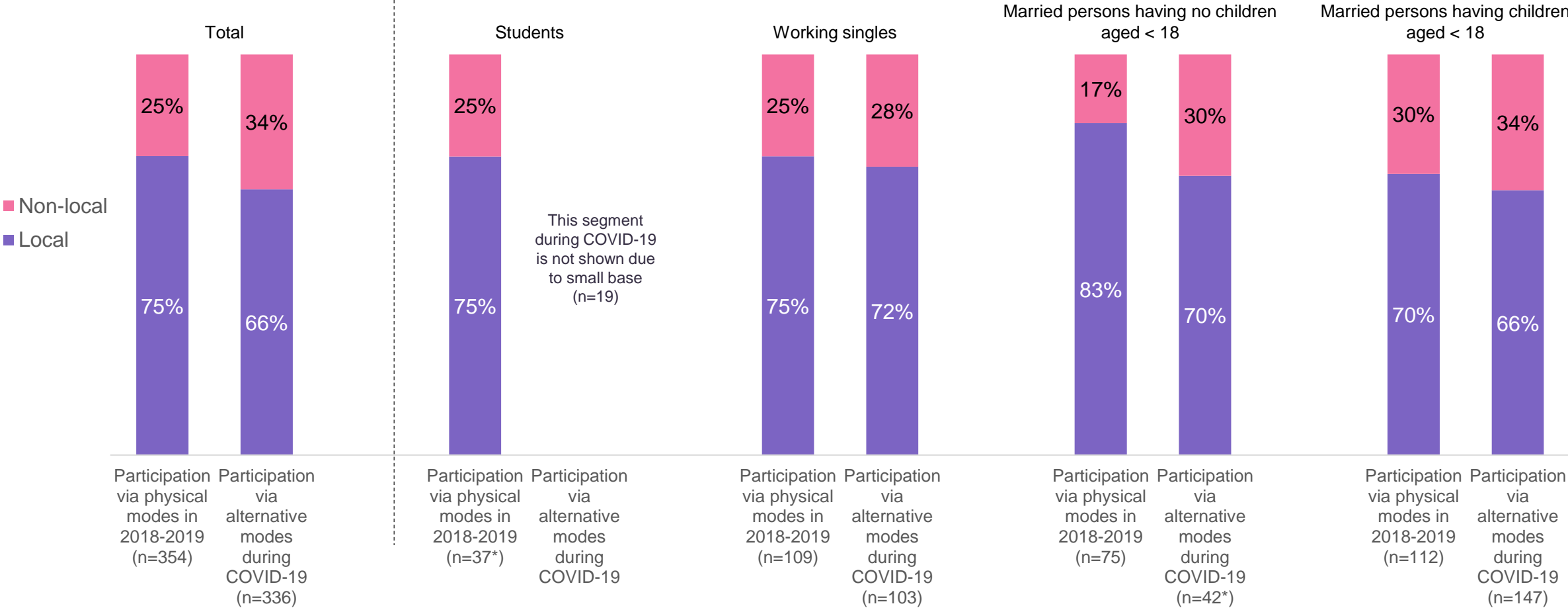
- Alternative-mode participation during COVID-19 was more inclined towards free programmes, which might also explain for the higher participation frequency as seen from previous slide.



Average ratio of participating Literary Activities featuring local authors vs. non-local authors

Note to readers: The segment of retirees (n=8 in 2018-2019, n=5 during COVID-19) is not shown due to small base

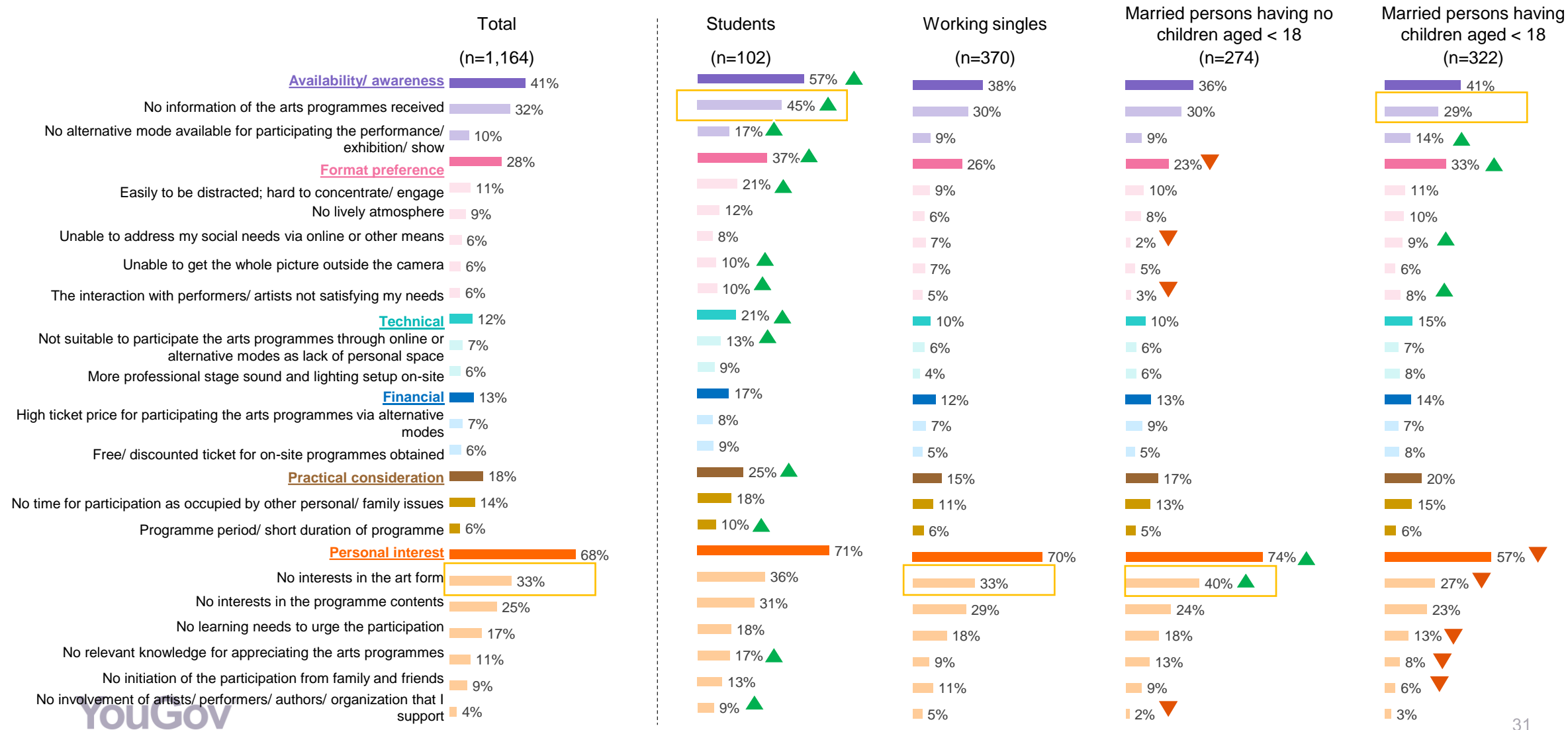
- Although Literary Activities featuring local authors remained dominant across all life segments, those featuring non-local authors became slightly more popular during COVID-19 than before.



Reasons for not participating via alternative modes during COVID-19 – Literary Activities

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

- Although lack of interest in the art form was in general a main reason for non-participation, a relatively large portion of students suggested that they had not participated in alternative-mode Literary Activities during COVID-19 because they had not received such programme information.



Base: Non-participants of Literary Activities programme via alternative modes during COVID-19

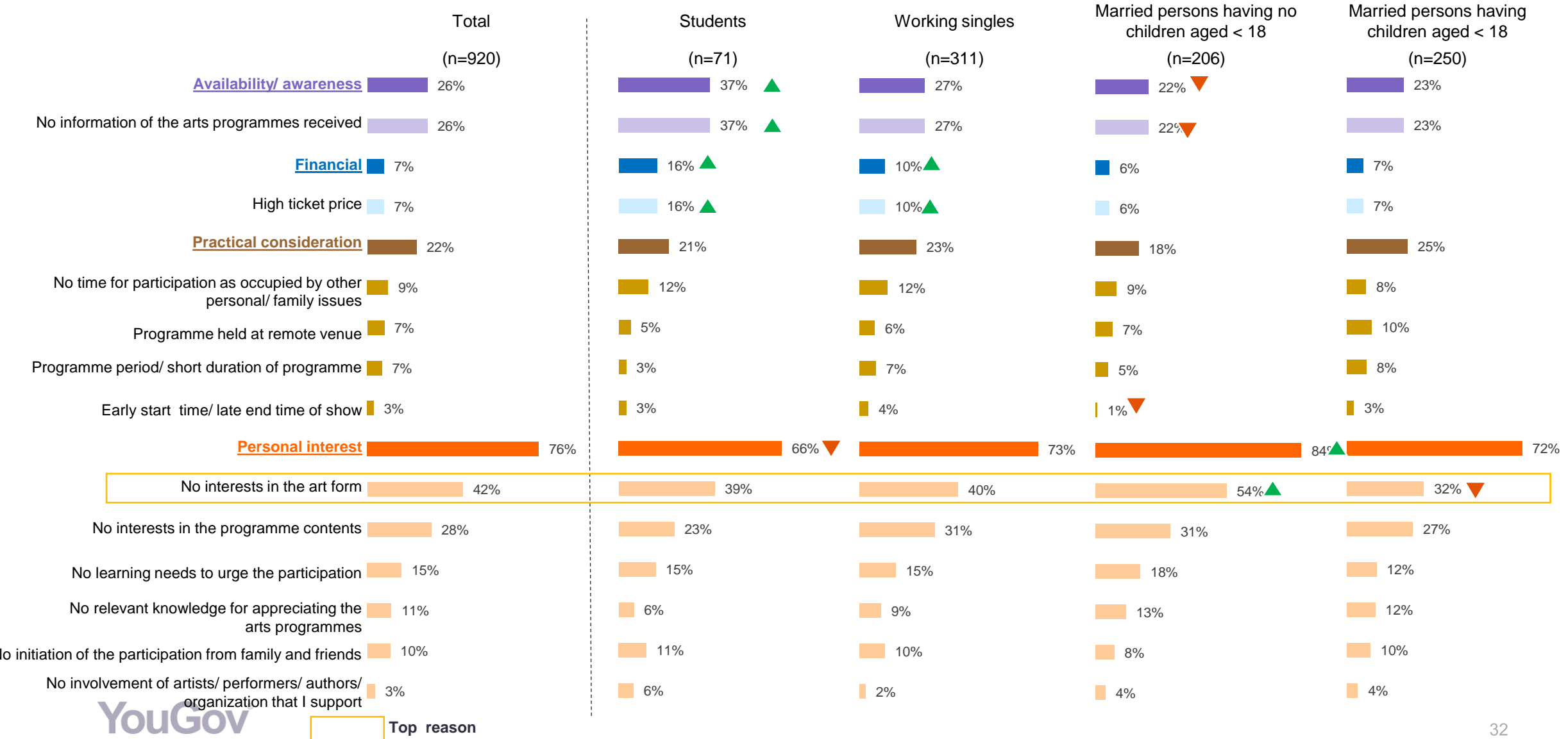
▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

Top reason

Reasons for not participating in 2018-2019 – Literary Activities

Note to readers: The segment of retirees is not shown due to small base (n=18)

- The reasons for non-participation in 2018-2019 were largely similar to what the respondents experienced during COVID-19.



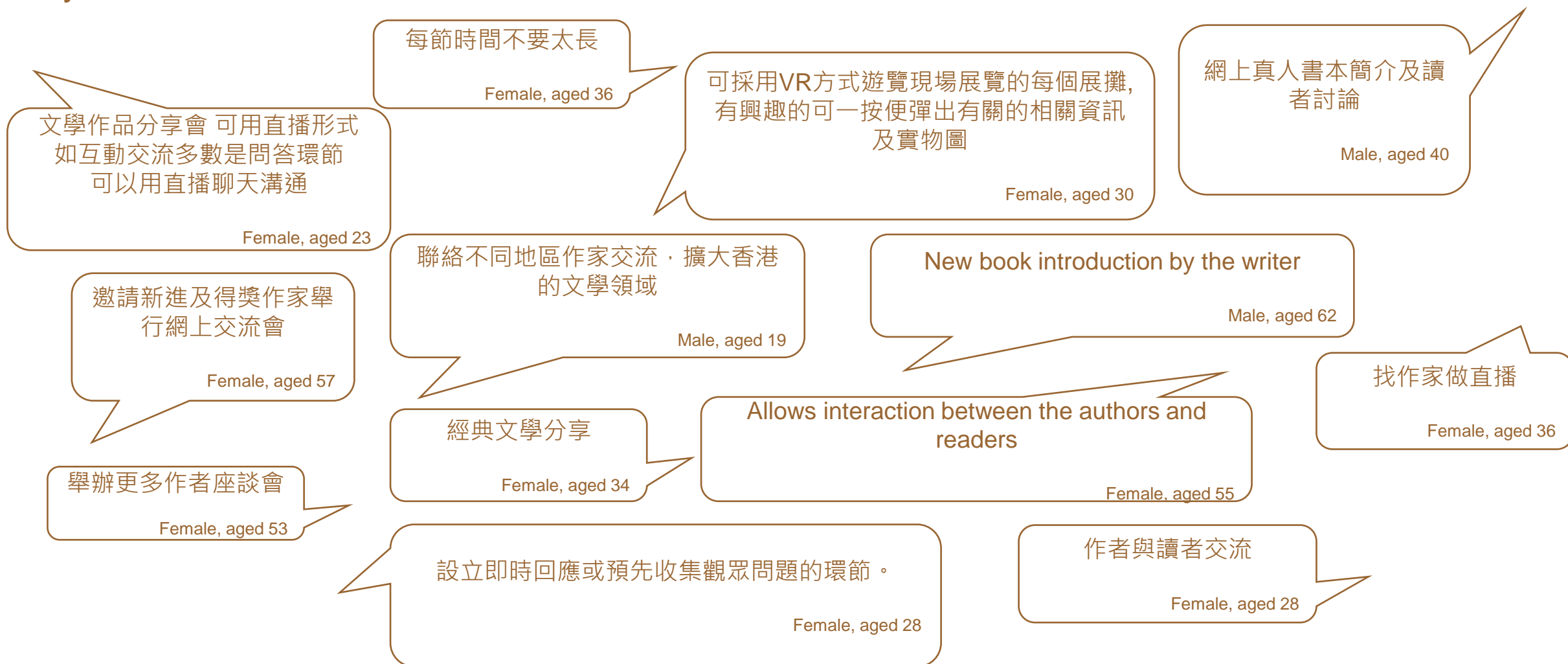
Top reason

Base: Non-participants of Literary Activities 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

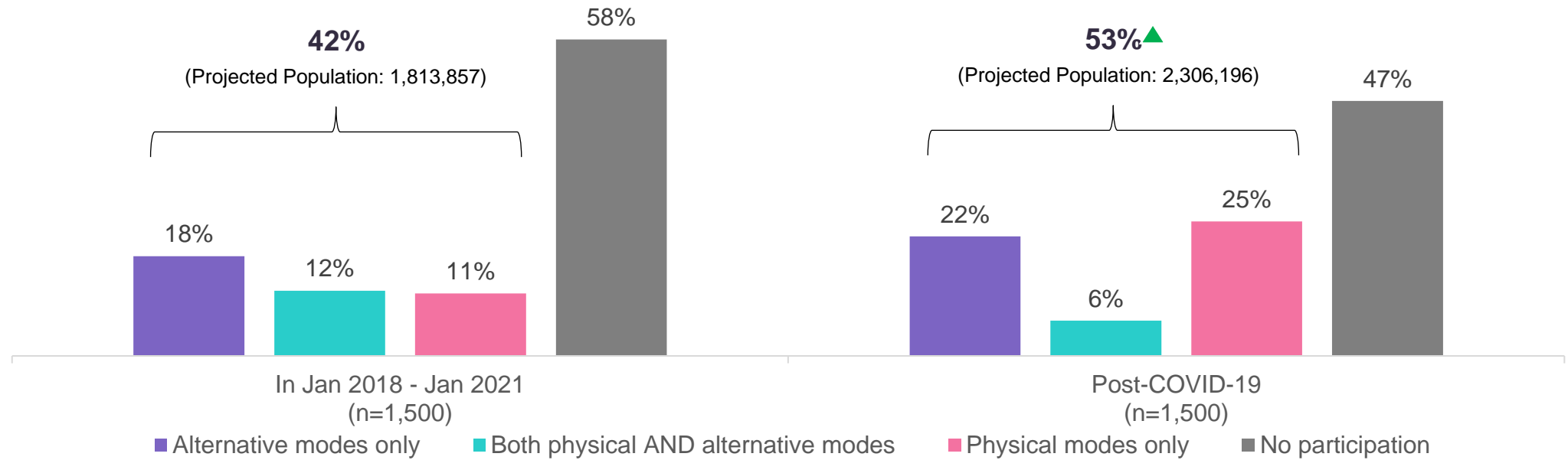
Literary Activities



Potential Participants of Literary Activities

Arts participation in Jan 2018 - Jan 2021 and claimed interest at post-COVID-19 period – Literary Activities

- 53% of respondents expressed interest in future Literary Activities, significantly higher than the actual participation incidence (42%) in recent years.
- The interest was mainly towards physical-mode programmes (growing from 23% to 31%), whereas interest in alternative-mode participation would drop slightly.

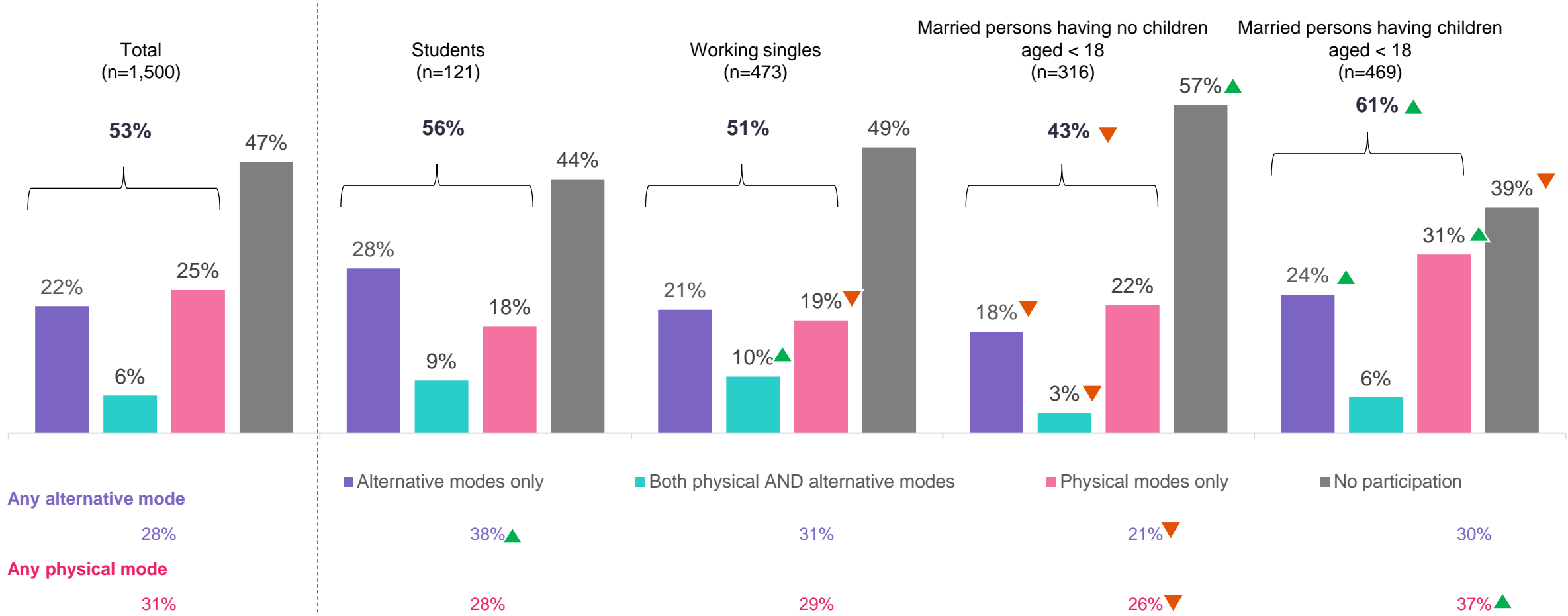


	In Jan 2018 - Jan 2021	Projected Population	Post-COVID-19	Projected Population
Any alternative mode	30%	1,315,930	28%	1,232,871
Any physical mode	23%	1,018,176	31%	1,353,740

Claimed interest in arts participation at post-COVID-19 period – Literary Activities – by life segments

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

- The interest in future Literary Activities was significantly stronger among married persons having young children, and this segment also shown a clear preference towards physical participation.
- More students would prefer participating in Literary Activities via alternative modes, even though in the past they had higher participation in physical programmes (see slide 27 for details).

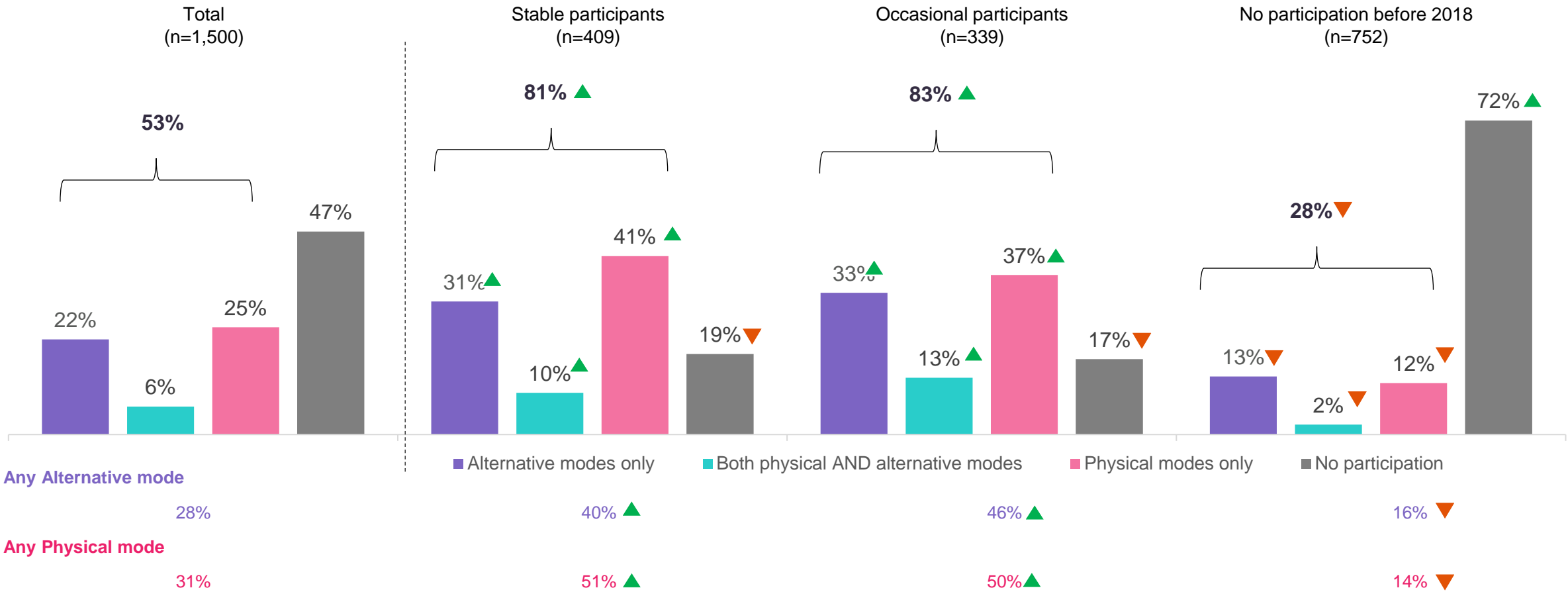


Base: All respondents, n=1,500

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

Claimed interest in arts participation at post-COVID-19 Period – Literary Activities – by participation frequency

- While both stable and occasional participants before 2018 were similarly likely to participate in future Literary Activities, occasional participants were relatively agreeable to participation in either physical or alternative modes.



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

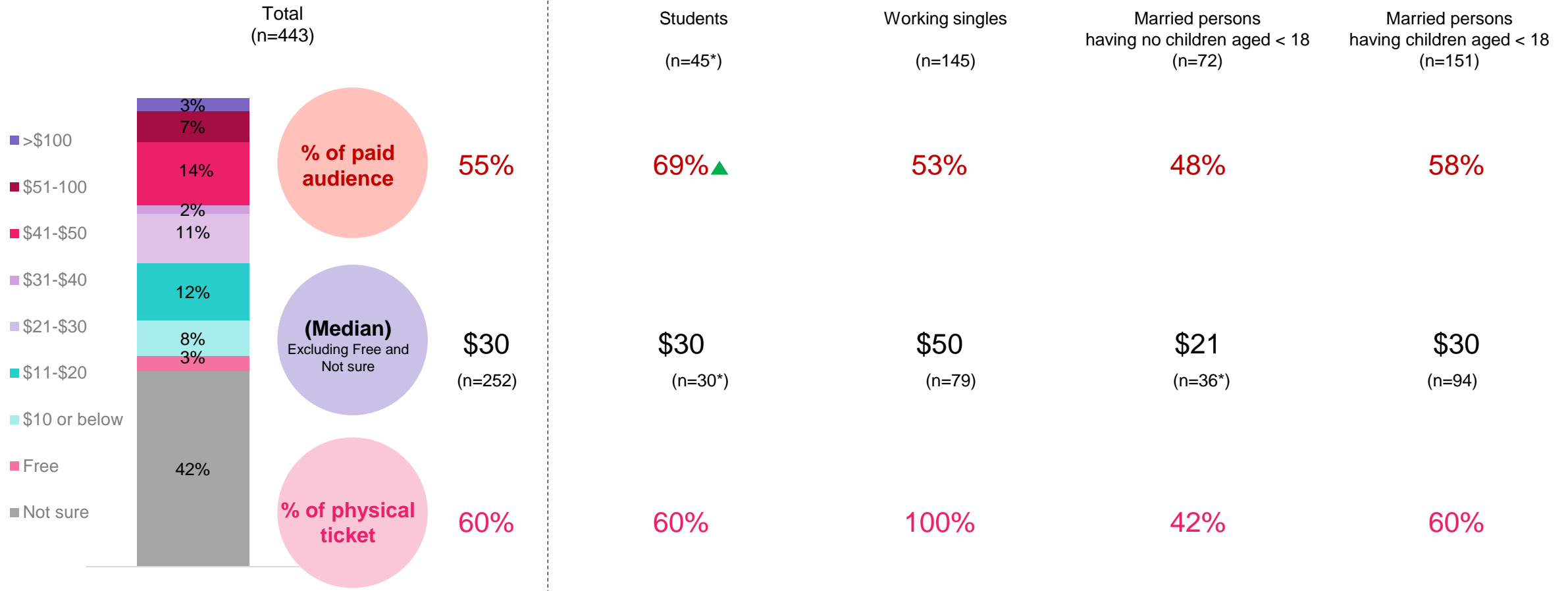
Base: All respondents, n=1,500

▲ ▼ 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 – Literary Activities – by life segments

Note to readers: The segment of retirees (n=6) is not shown due to small base
 Assuming ticket price HKD50 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 a 40% discount off the physical ticket price. Working singles were prepared to pay for a higher price.



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

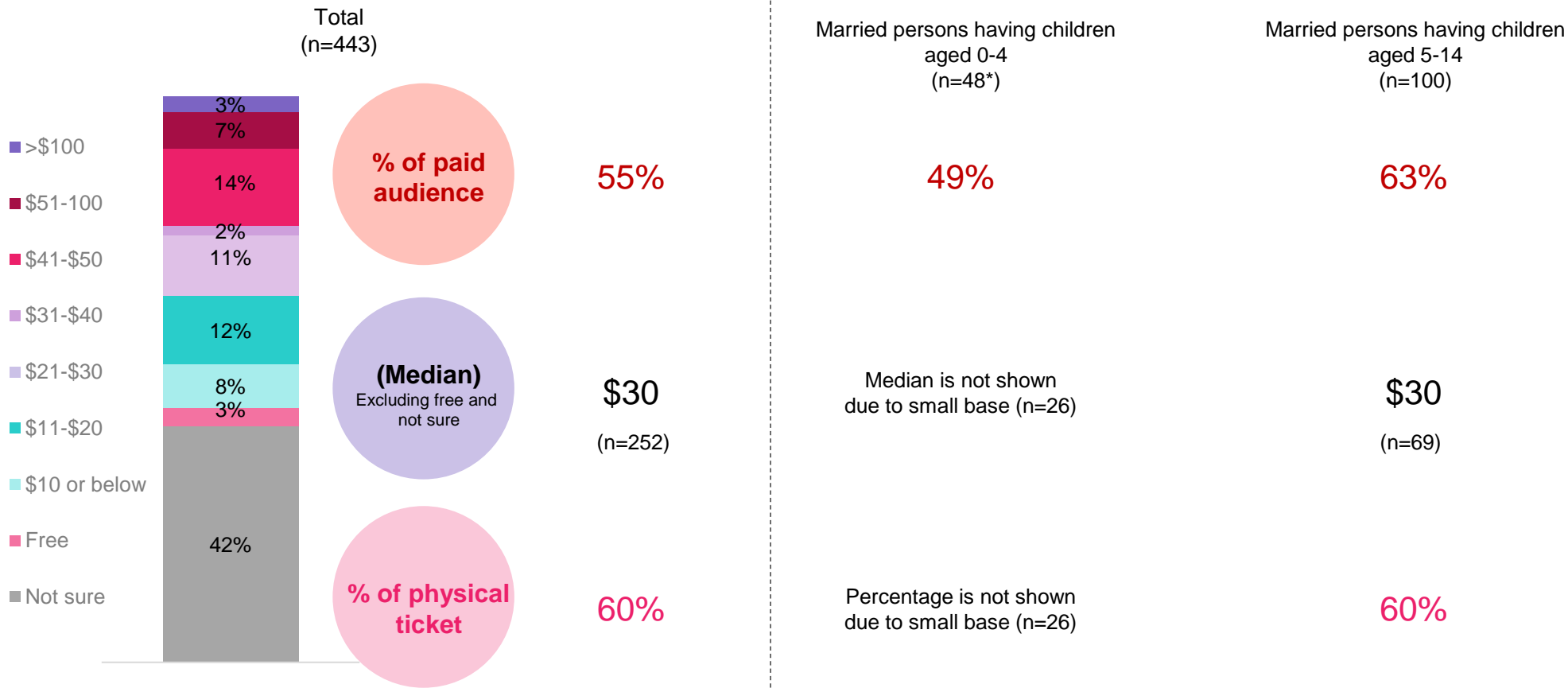
▲▼ Denote the figure of the segment is significantly higher/ lower than the total

Acceptable price level for arts participation via alternative modes at post-COVID-19 period – Literary Activities – by life segments

Note to readers: The segment of married persons having children aged 15+ is not shown due to small base (n=19)

Assuming ticket price HKD50 for in-person admission

- More married persons having children aged 5 – 14 were willing to pay for alternative-mode Literary Activities.



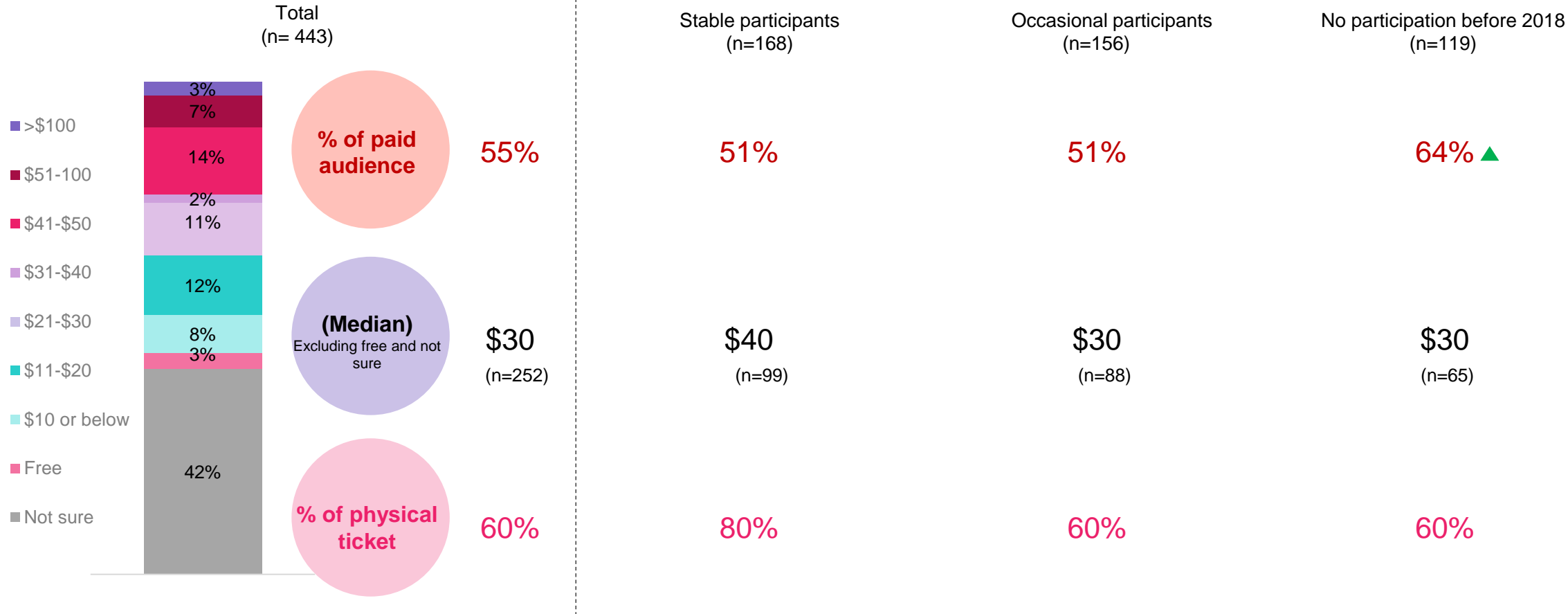
Base: Those consider alternative modes for participating respective art forms at post-COVID-19

▲ ▼ 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 – Literary Activities – by participation frequency

Assuming ticket price HKD50 for in-person admission

- Compared to occasional participants, although stable participants before 2018 had a lower interest in alternative-mode Literary Activities (see slide 37 for details), they were willing to pay more for such programmes.



YouGov® 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

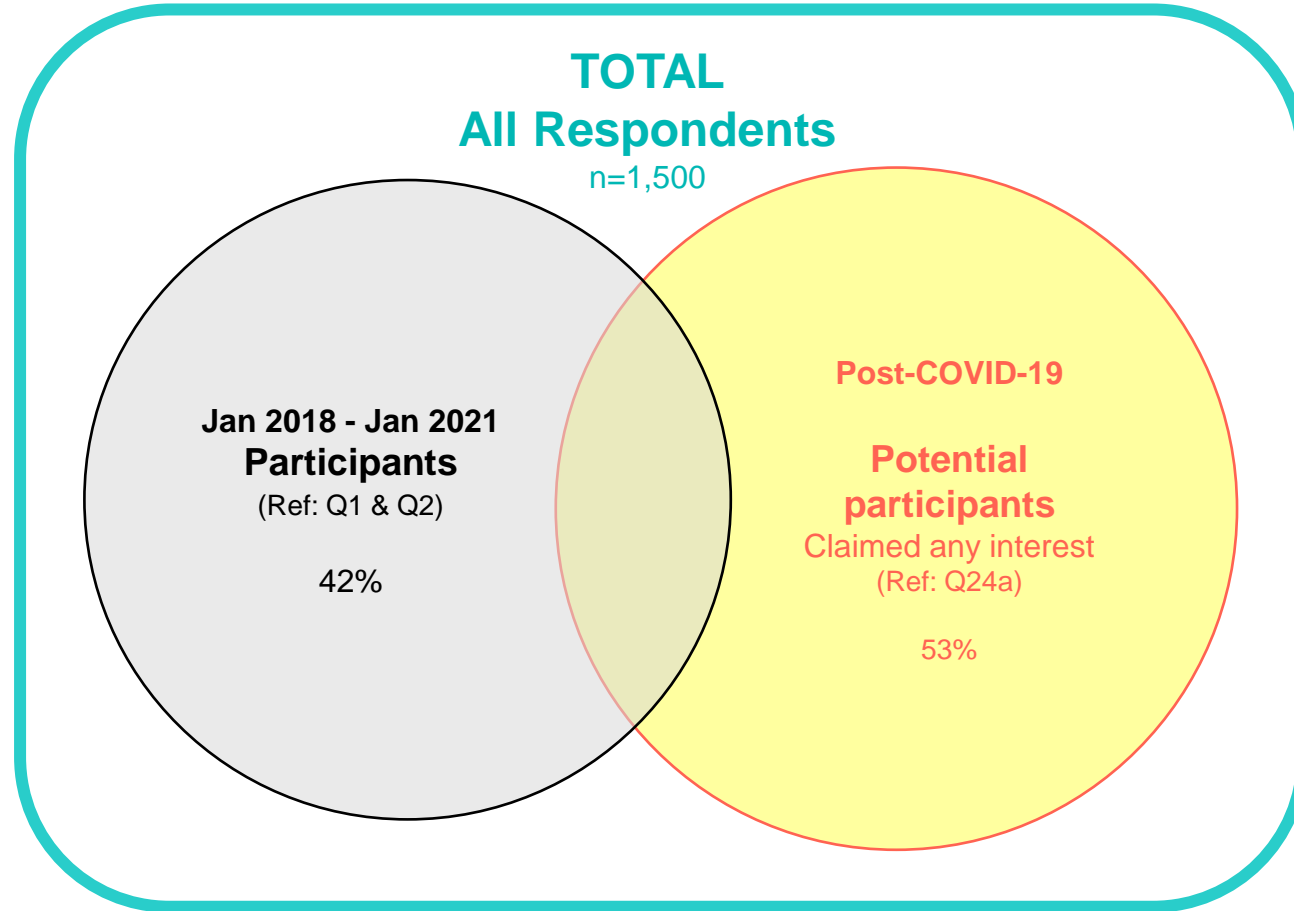
Base: Those consider alternative modes for participating respective art forms at post-COVID-19

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

Profiles of Potential Participants of Literary Activities

Actual participants in Jan 2018 – Jan 2021 and potential participants at post-COVID-19 period – Literary Activities

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



Profiles of potential participants - Literary Activities

- Both actual participants in Jan 2018 – Jan 2021 and potential participants at post-COVID-19 period were skewed towards young adults aged 25-34, business owners/ managers and professionals and married persons having children. They tended to be more educated and have higher household income.

	Total (n=1,500)	Participants in Jan 2018 – Jan 2021 (n=655)	Potential participants (n=825)
Gender			
Male	44%	45%	47% ▲
Female	56%	55%	53% ▼
Age Group			
16-24	13%	15%	14%
25-34	20%	24% ▲	23% ▲
35-44	22%	23%	23%
45-54	22%	21%	22%
55-64	23%	17% ▼	17% ▼
Occupation			
Business owners/ Managers and professionals	14%	18% ▲	17% ▲
White-collar	27%	27%	27%
Blue-collar	34%	32%	34%
Housewives	7%	5% ▼	5% ▼
Students	9%	11%	10%
Retirees	3%	3%	3%
Unemployed	5%	4%	4% ▼
Life Segment			
Students	9%	11%	10%
Working singles	22%	20%	21%
Married persons having no children aged < 18	24%	18% ▼	20% ▼
Married persons having children aged < 18	32%	39% ▲	37% ▲
Education Level			
Secondary or below	45%	37% ▼	36% ▼
Post-secondary / University	55%	63% ▲	64% ▲
Monthly Household Income			
Below HKD 30,000	64%	58% ▼	59% ▼
HKD 30,000 - 49,999	24%	27% ▲	26% ▲
More than HKD 50,000	12%	15% ▲	15% ▲

	Total (n=1,500)	Participants in Jan 2018 – Jan 2021 (n=655)	Potential participants (n=825)
Region & living district			
Hong Kong Island	17%	21% ▲	18%
Central & Western	3%	4%	4% ▲
Eastern	8%	11% ▲	8%
Southern	4%	4%	4%
Wan Chai	2%	2%	2%
Kowloon	30%	31%	32%
Kowloon City	6%	8% ▲	6%
Kwun Tong	8%	9%	8%
Sham Shui Po	6%	6%	8% ▲
Wong Tai Sin	6%	4%	5%
Yau Tsim Mong	4%	4%	5%
New Territories	53%	48% ▼	50% ▼
Kwai Tsing	7%	7%	7%
North	5%	5%	5%
Sai Kung	7%	6%	6%
Sha Tin	8%	8%	8%
Tai Po	4%	4%	4%
Tsuen Wan	4%	3%	4%
Tuen Mun	8%	7%	7%
Yuen Long	8%	6% ▼	7%
Islands	3%	3%	3% ▲

Profiles of potential participants - Literary Activities

- Nearly half of the potential participants were lapsed participants, meaning that they were still interested in Literary Activities despite their non-participation in this art form recently. (See slides 61-62 for reasons of non-participation of these lapsed participants)

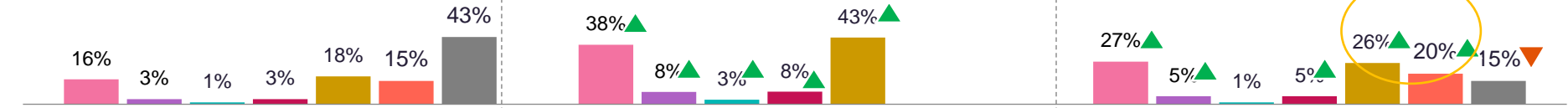
Distribution of segments

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

Total
(n=1,500)

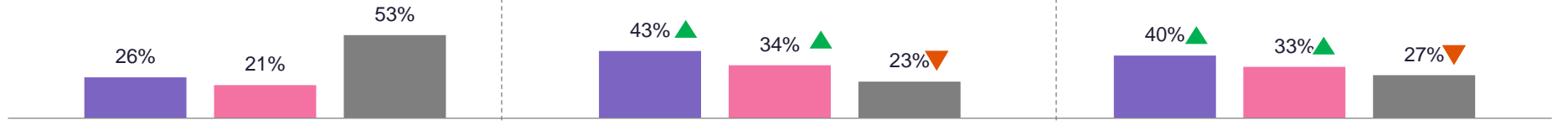
Participants in Jan 2018 – Jan 2021
(n=655)

Potential participants
(n=825)



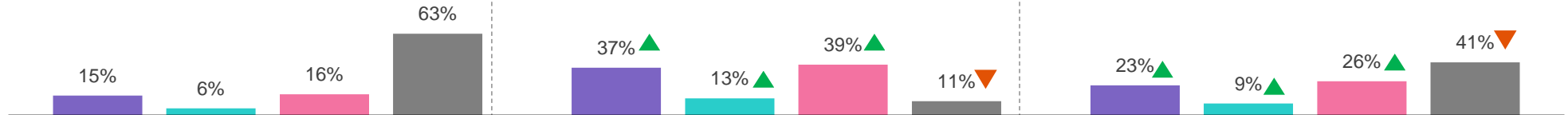
Participation before 2018

- Stable participation
- Occasional participation
- No participation



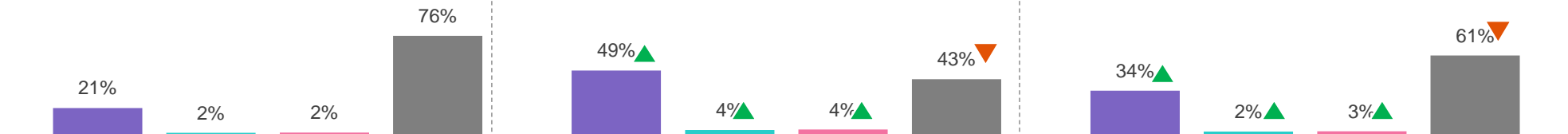
Mode of participation in 2018 – 2019

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



Mode of participation during COVID-19

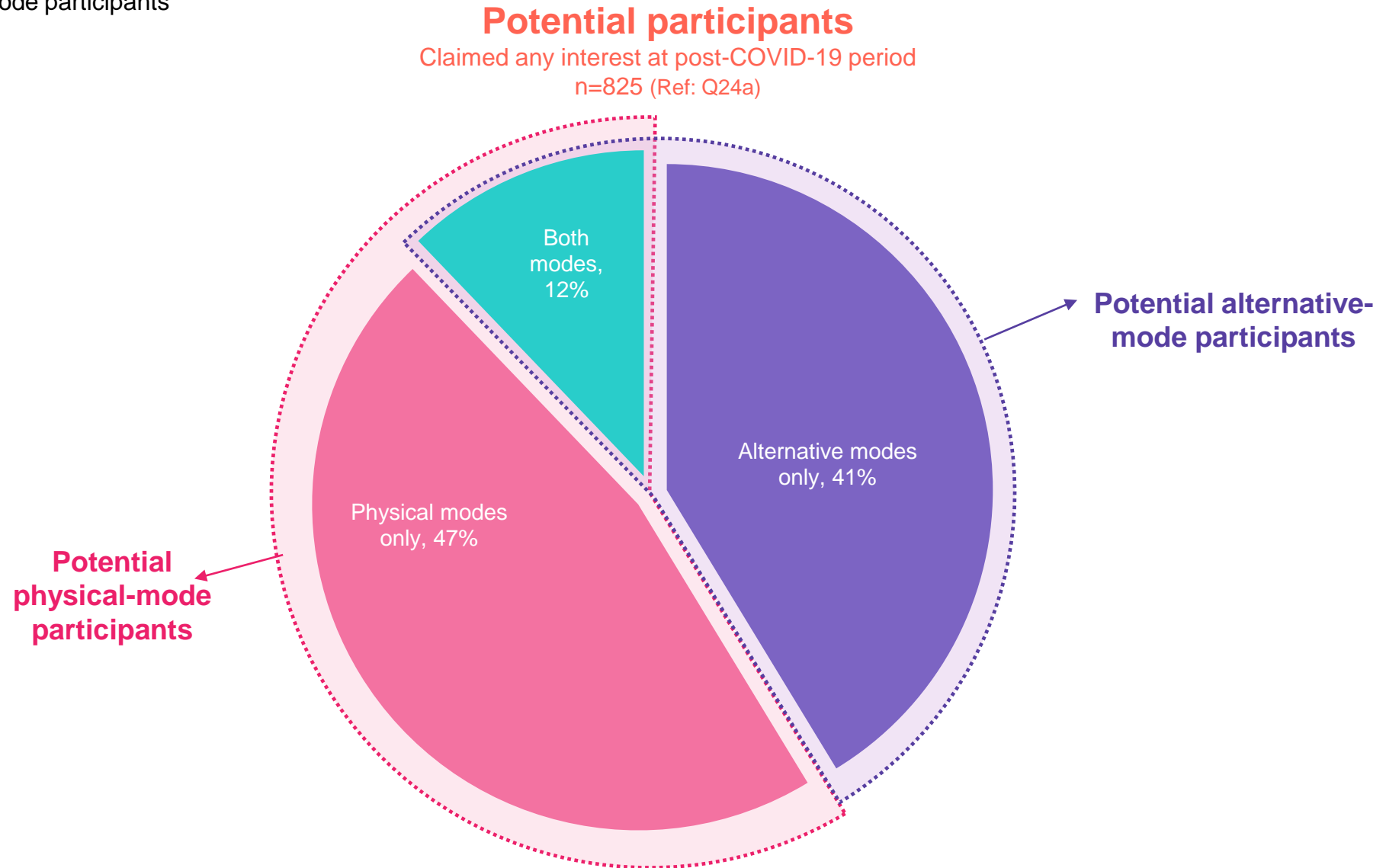
- Alternative modes only
- Both physical AND alternative modes
- Physical modes only
- No participation



Profile of Potential Participants – by Mode of Participation

Distribution of potential participants by mode preference – Literary Activities

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



Profiles of potential participants – Literary Activities – by mode of participation

- The profile patterns of potential physical- and alternative-mode participants were largely similar.

	Potential participants (n=825)	Potential physical-mode participants (n=486)	Potential alternative-mode participants (n=443)
Gender			
Male	47%	44%	48%
Female	53%	56%	52%
Age Group			
16-24	14%	13%	16%
25-34	23%	26%	21%
35-44	23%	22%	24%
45-54	22%	22%	23%
55-64	17%	17%	15%
Occupation			
Business owners/ Managers and professionals	17%	18%	17%
White-collar	27%	28%	27%
Blue-collar	34%	34%	34%
Housewives	5%	5%	4%
Students	10%	8%	12%
Retirees	3%	4%	3%
Unemployed	4%	3%	4%
Life Segment			
Students	10%	8%	12%
Working singles	21%	21%	24%
Married persons having no children aged < 18	20%	20%	18%
Married persons having children aged < 18	37%	38%	34%
Education Level			
Secondary or below	36%	35%	36%
Post-secondary / University	64%	65%	64%
Monthly Household Income			
Below HKD 30,000	59%	59%	60%
HKD 30,000 - 49,999	26%	25%	27%
More than HKD 50,000	15%	16%	13%

	Potential participants (n=825)	Potential physical-mode participants (n=486)	Potential alternative-mode participants (n=443)
Region & living district			
Hong Kong Island	18%	19%	17%
Central & Western	4%	5%	2%
Eastern	8%	8%	9%
Southern	4%	4%	4%
Wan Chai	2%	1%	2%
Kowloon	32%	32%	33%
Kowloon City	6%	8%	5%
Kwun Tong	8%	8%	8%
Sham Shui Po	8%	8%	7%
Wong Tai Sin	5%	4%	6%
Yau Tsim Mong	5%	4%	7%
New Territories	50%	49%	50%
Kwai Tsing	7%	6%	7%
North	5%	5%	4%
Sai Kung	6%	6%	7%
Sha Tin	8%	7%	8%
Tai Po	4%	4%	4%
Tsuen Wan	4%	4%	3%
Tuen Mun	7%	8%	6%
Yuen Long	7%	6%	7%
Islands	3%	3%	3%

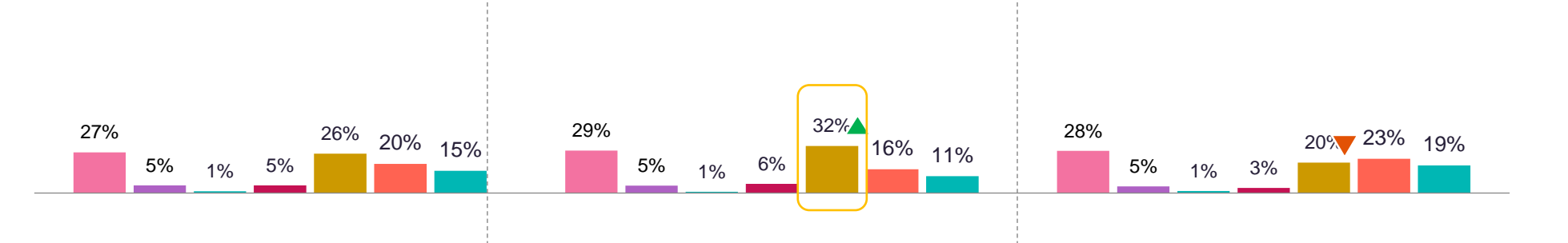
Profiles of potential participants – Literary Activities – by mode of participation

- Compared to their alternative-mode counterparts, more potential physical-mode participants had participated only in physical programmes in 2018-2019. This might explain why there were also more potential physical-mode participants who had ceased participation since COVID-19 when fewer physical programmes were available.

Distribution of segments

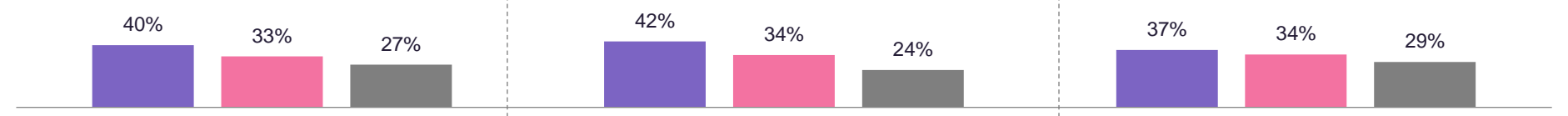
- Retaining participants
- Young participants
- New participants
- Returning participants
- Lapsed participants since COVID-19
- Lapsed participants since 2018
- Non-participants

Potential participants (n=825) Potential physical-mode participants (n=486) Potential alternative-mode participants (n=443)



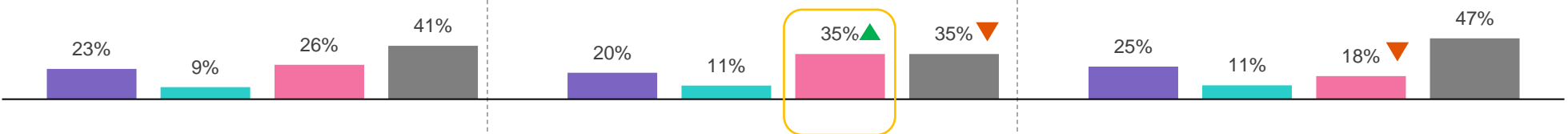
Participation before 2018

- Stable participation
- Occasional participation
- No participation



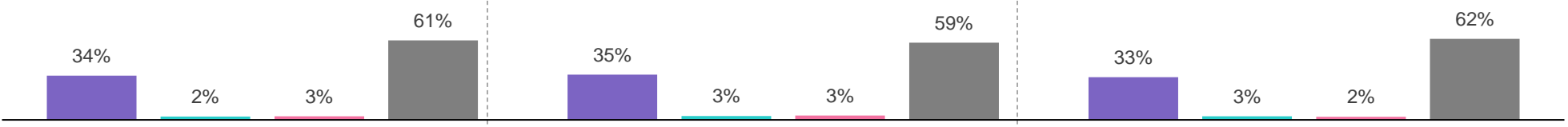
Mode of participation in 2018 – 2019

- 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



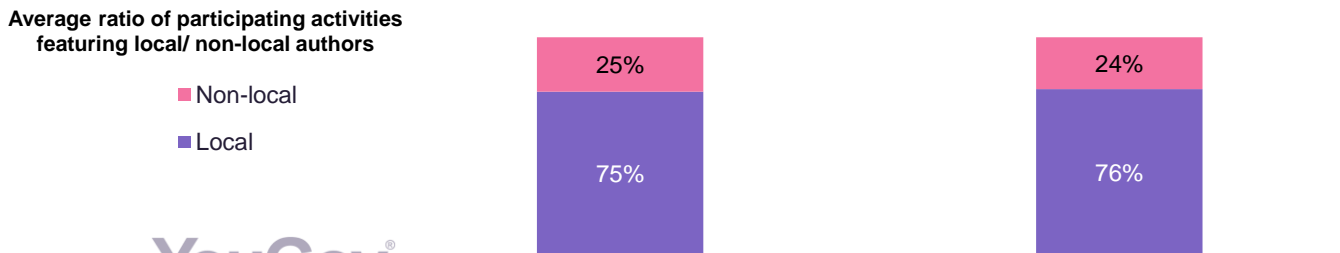
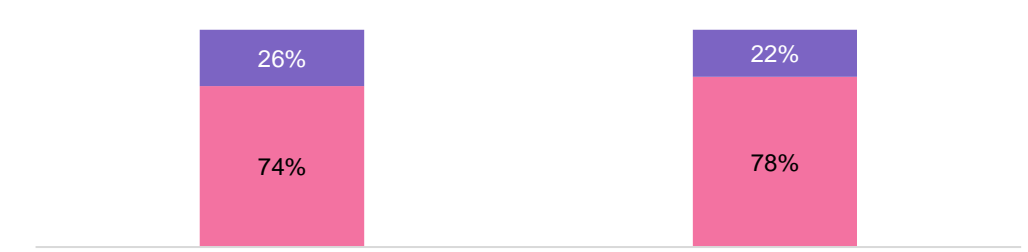
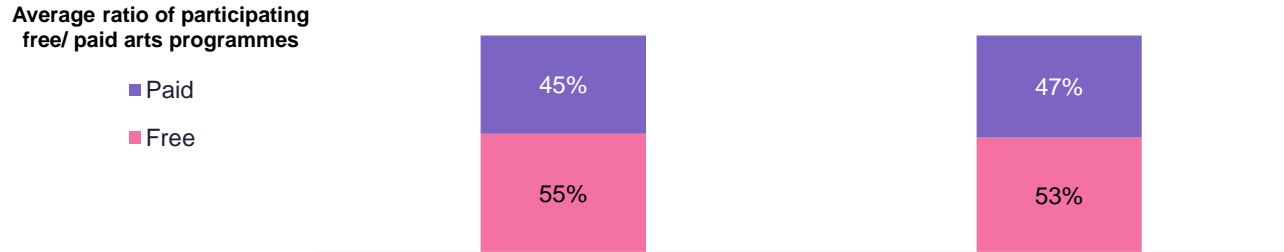
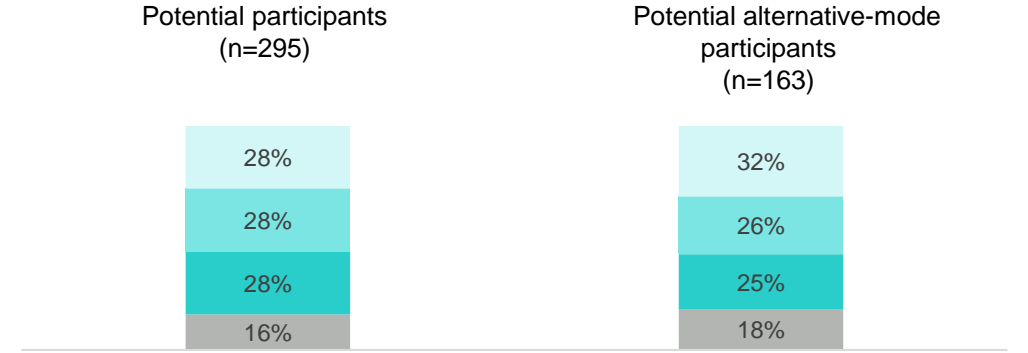
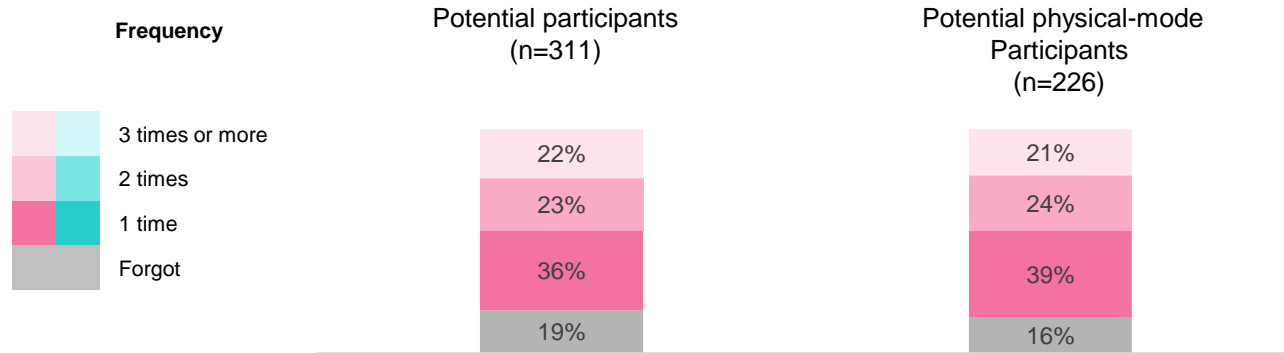
▲ ▼ Denote the figure of the segment is significantly higher/ lower than potential participants

Profiles of potential participants – Literary Activities – by mode of participation

- The past participation patterns of both potential physical- and alternative-mode participants were largely similar to those of overall potential participants.

Participation via physical modes in 2018-2019

Participation via alternative modes during COVID-19



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.

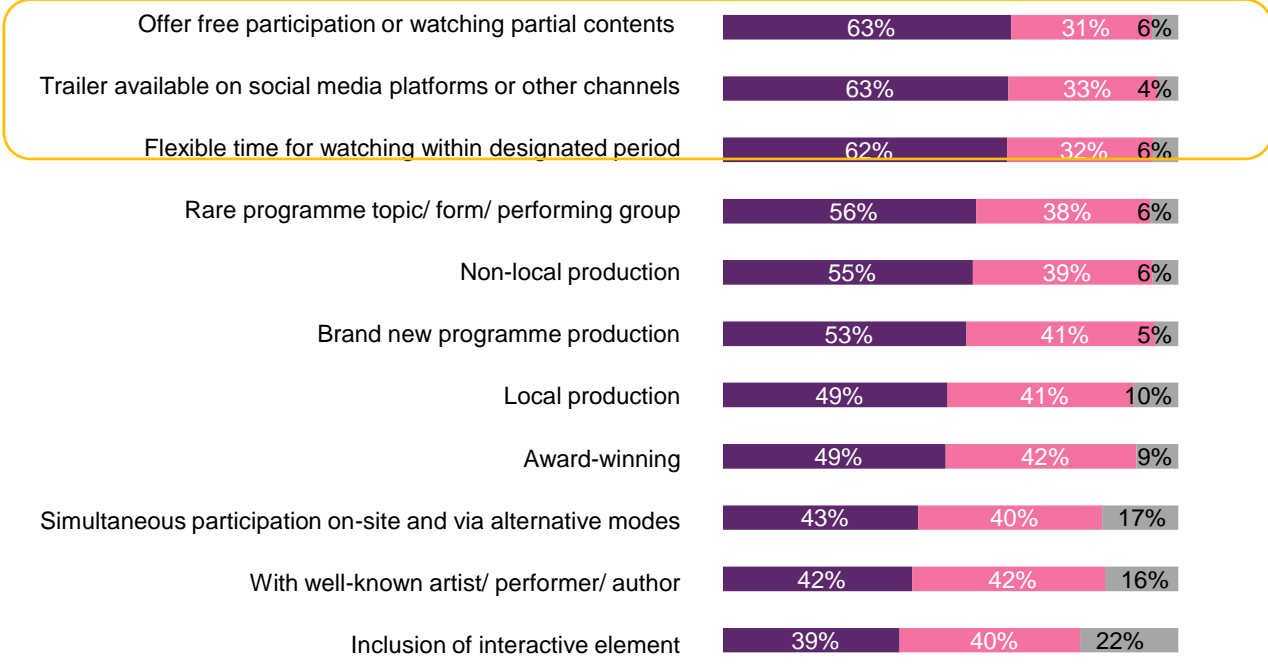
Profiles of potential participants – Literary Activities – important elements and information source for alternative modes

- Free programmes, online trailers and flexible time for watching could drive the strongest interest in alternative-mode participation.
- Similar to other art forms, social media platforms play an important role in promoting Literary Activities.

Important elements driving alternative modes

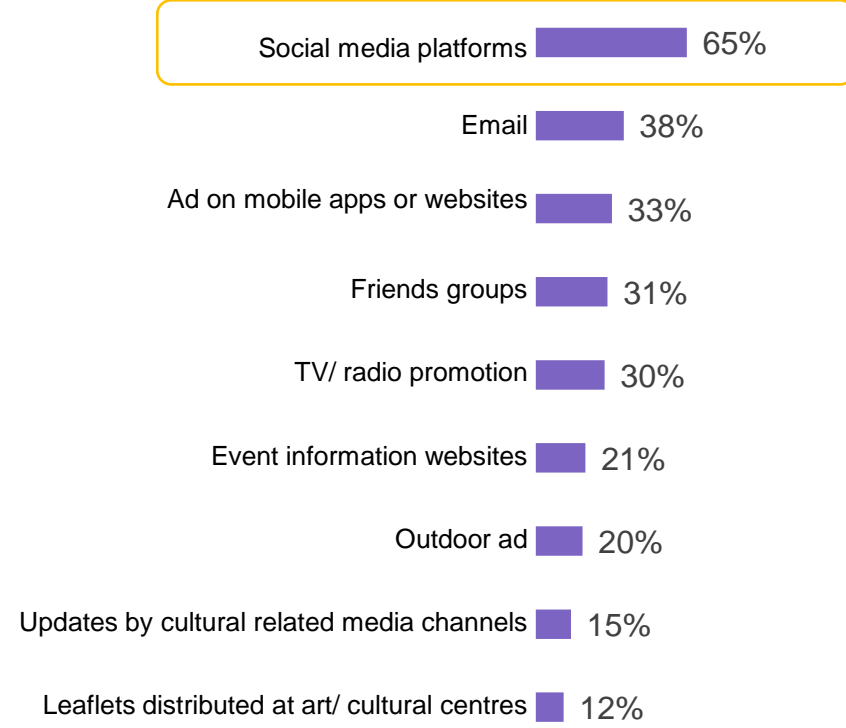
Potential alternative-mode participants
(n=443)

- 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=411)

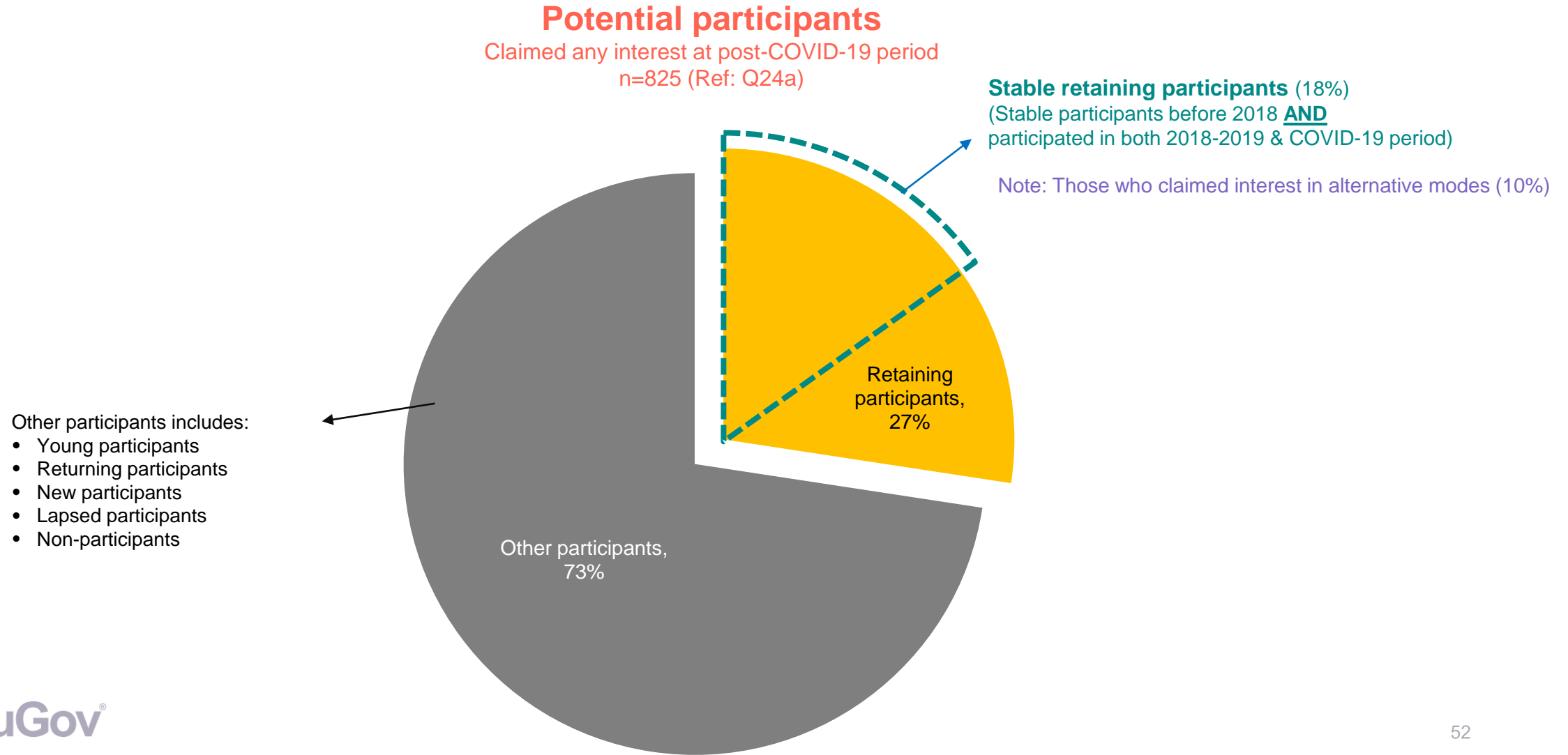


Note: For information source, respondents without awareness of or prior experience in alternative programmes are excluded, so the base does not cover all potential alternative-mode participants.

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

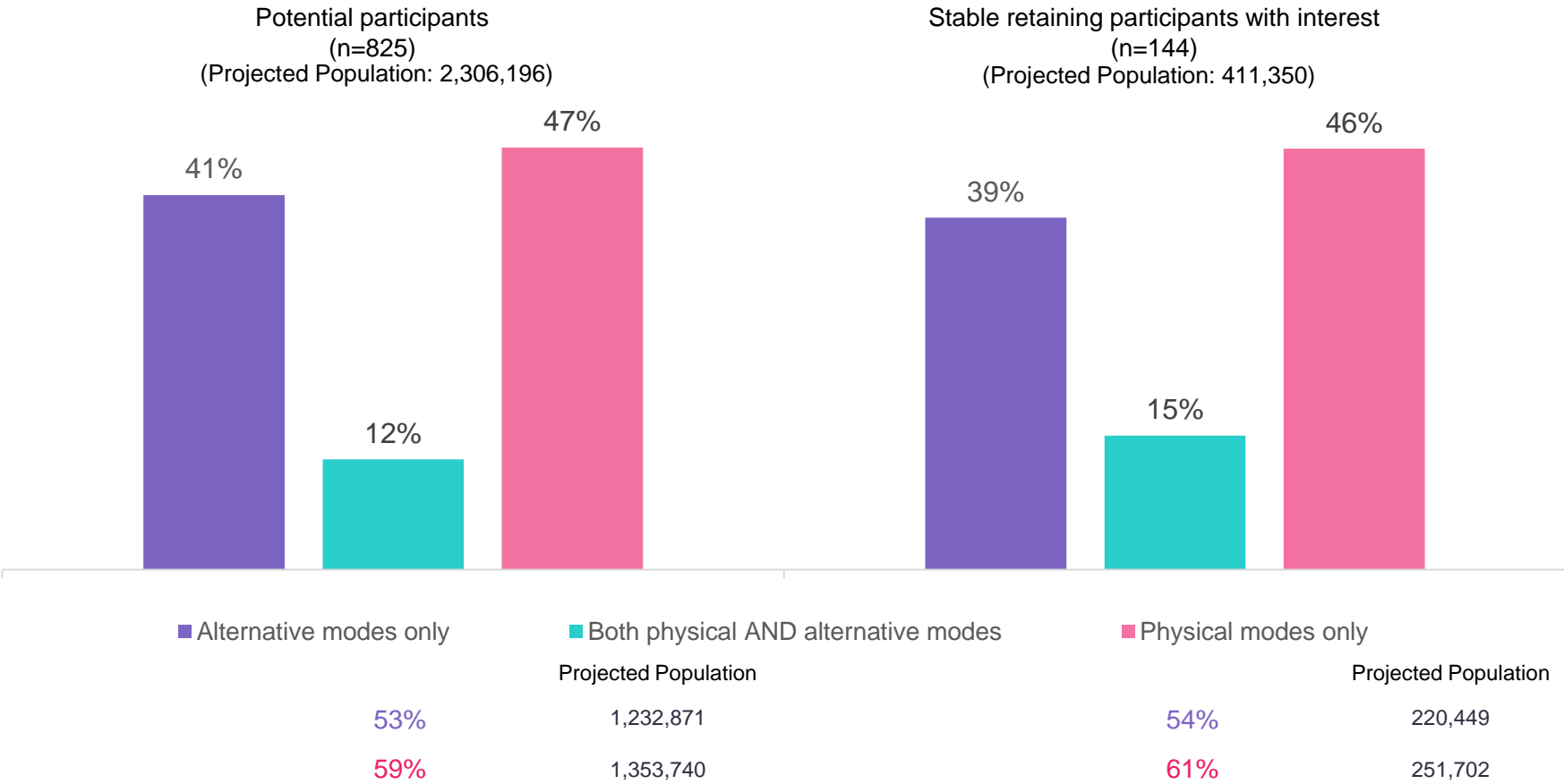
Proportion of stable retaining participation with interest among potential participants – Literary Activities

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



Stable retaining participants with participation interest at post-COVID-19 period – Literary Activities

- Stable retaining participants with future participation interest expressed similar levels of interest as all potential participants towards either physical or alternative modes.



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 – Literary Activities

- Stable retaining participants with interest were skewed towards 25-34 years old and married persons having children under 18. They also tended to be have higher household income than all potential participants.

	Total (n=1,500)	Potential participants (n=825)	Stable retaining participants with interest (n=144)
Gender			
Male	44%	47% ▲	48%
Female	56%	53% ▼	52%
Age Group			
16-24	13%	14%	10%
25-34	20%	23% ▲	30% ▲
35-44	22%	23%	26%
45-54	22%	22%	22%
55-64	23%	17% ▼	13% ▼
Occupation			
Business owners/ Managers and professionals	14%	17% ▲	23% ▲
White-collar	27%	27%	24%
Blue-collar	34%	34%	43% ▲
Housewives	7%	5% ▼	3% ▼
Students	9%	10%	2% ▼
Retirees	3%	3%	3%
Unemployed	5%	4% ▼	2%
Life Segment			
Students	9%	10%	2% ▼
Working singles	22%	21%	20%
Married persons having no children aged < 18	24%	20% ▼	12% ▼
Married persons having children aged < 18	32%	37% ▲	55% ▲
Education Level			
Secondary or below	45%	36% ▼	41%
Post-secondary / University	55%	64% ▲	59%
Monthly Household Income			
Below HKD 30,000	64%	59% ▼	41% ▼
HKD 30,000 - 49,999	24%	26% ▲	39% ▲
More than HKD 50,000	12%	15% ▲	20% ▲

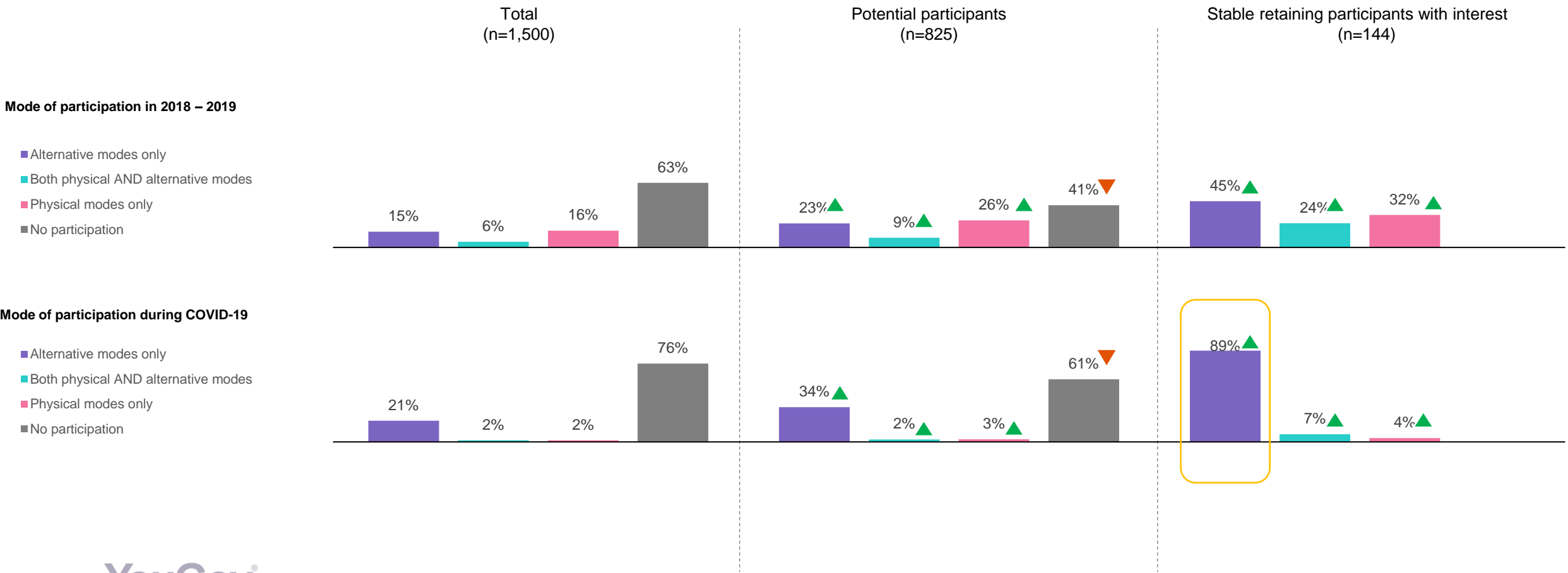
	Total (n=1,500)	Potential participants (n=825)	Stable retaining participants with interest (n=144)
Region & living district			
Hong Kong Island	17%	18%	21%
Central & Western	3%	4% ▲	3%
Eastern	8%	8%	11%
Southern	4%	4%	5%
Wan Chai	2%	2%	2%
Kowloon	30%	32%	23%
Kowloon City	6%	6%	9% ▲
Kwun Tong	8%	8%	4%
Sham Shui Po	6%	8% ▲	2%
Wong Tai Sin	6%	5%	4%
Yau Tsim Mong	4%	5%	3%
New Territories	53%	50% ▼	56%
Kwai Tsing	7%	7%	9%
North	5%	5%	7%
Sai Kung	7%	6%	7%
Sha Tin	8%	8%	10%
Tai Po	4%	4%	6%
Tsuen Wan	4%	4%	2%
Tuen Mun	8%	7%	6%
Yuen Long	8%	7%	6%
Islands	3%	3% ▲	3%



▲ ▼ 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 – Literary Activities

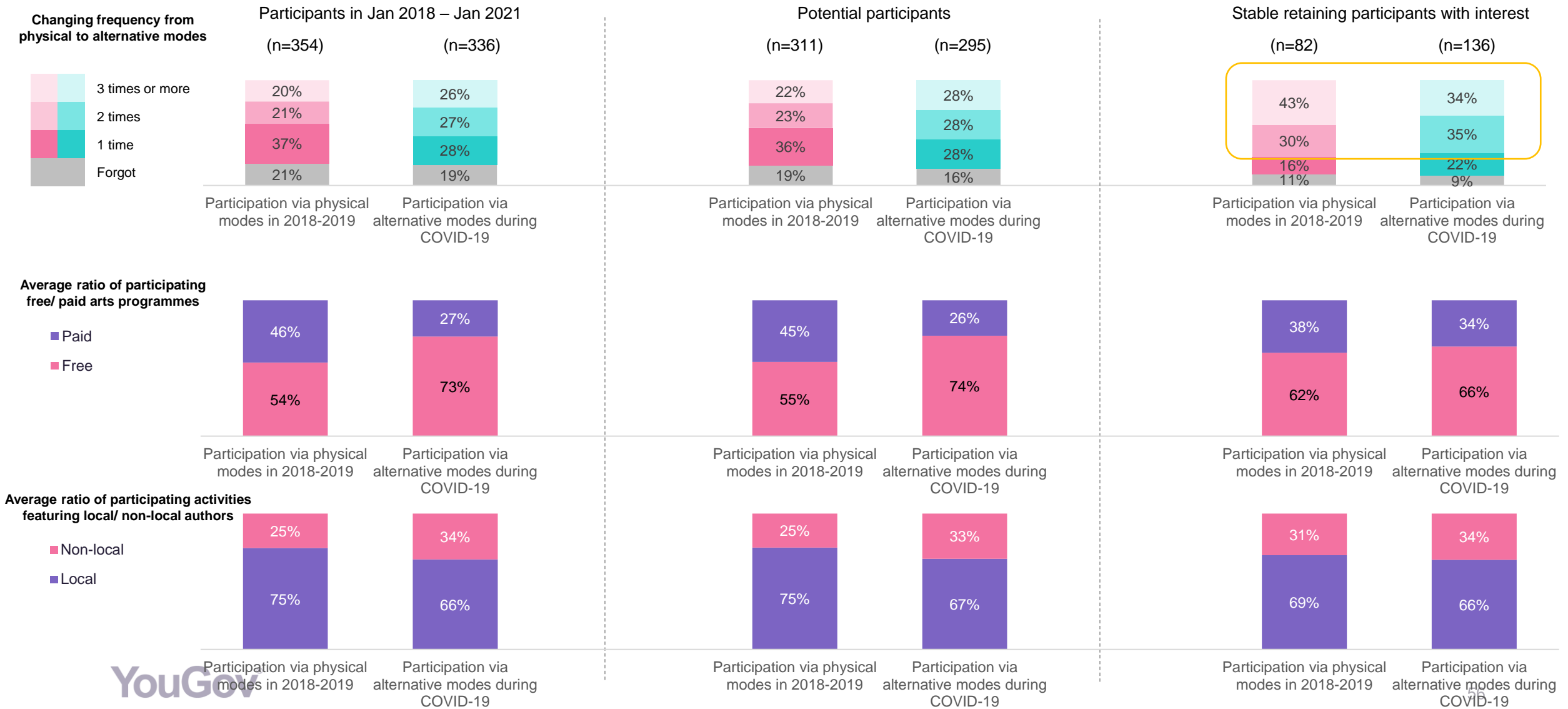
- Stable retaining participants with interest had a very strong adaptation to alternative-mode programmes during COVID-19 (89%).



▲▼ 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 – Literary Activities

- Stable retaining participants with interest had been frequent participants in either physical or alternative modes.



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 – Literary Activities

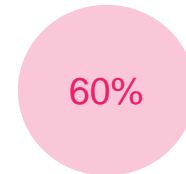
- Stable retaining participants with interest in alternative-mode Literary Activities were willing to pay more for such programmes.

Acceptable price level (Median)

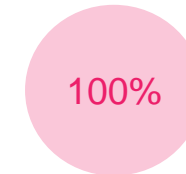
Excluding Free and Not sure

Note: Assuming ticket price HKD50 for in-person admission

Potential alternative-mode participants
(n=252)



Stable retaining participants with interest in alternative modes
(n=57)

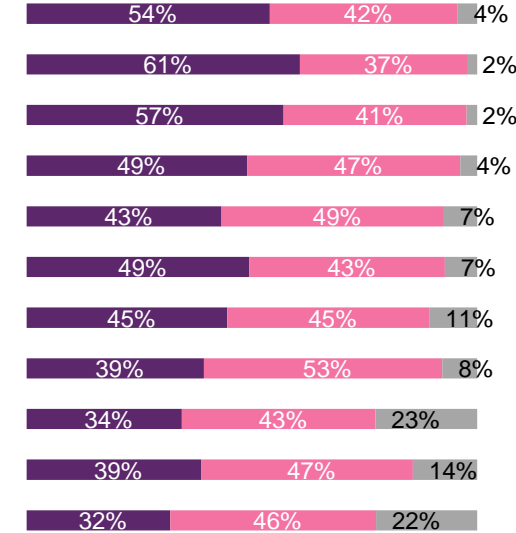
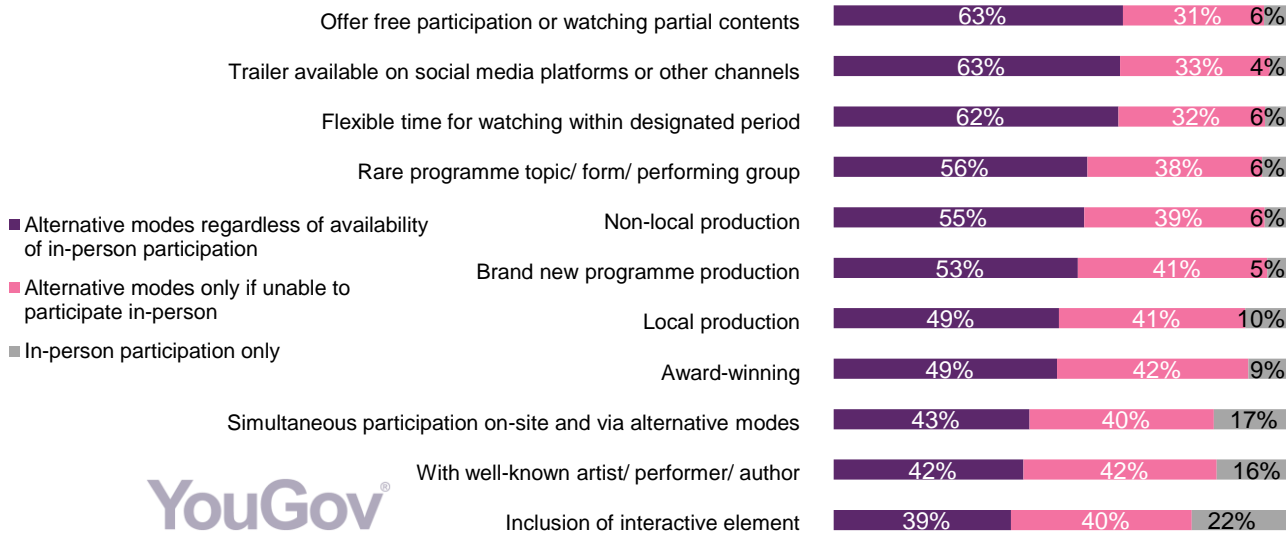


% of physical ticket

Important elements driving alternative modes

Potential alternative-mode participants
(n=443)

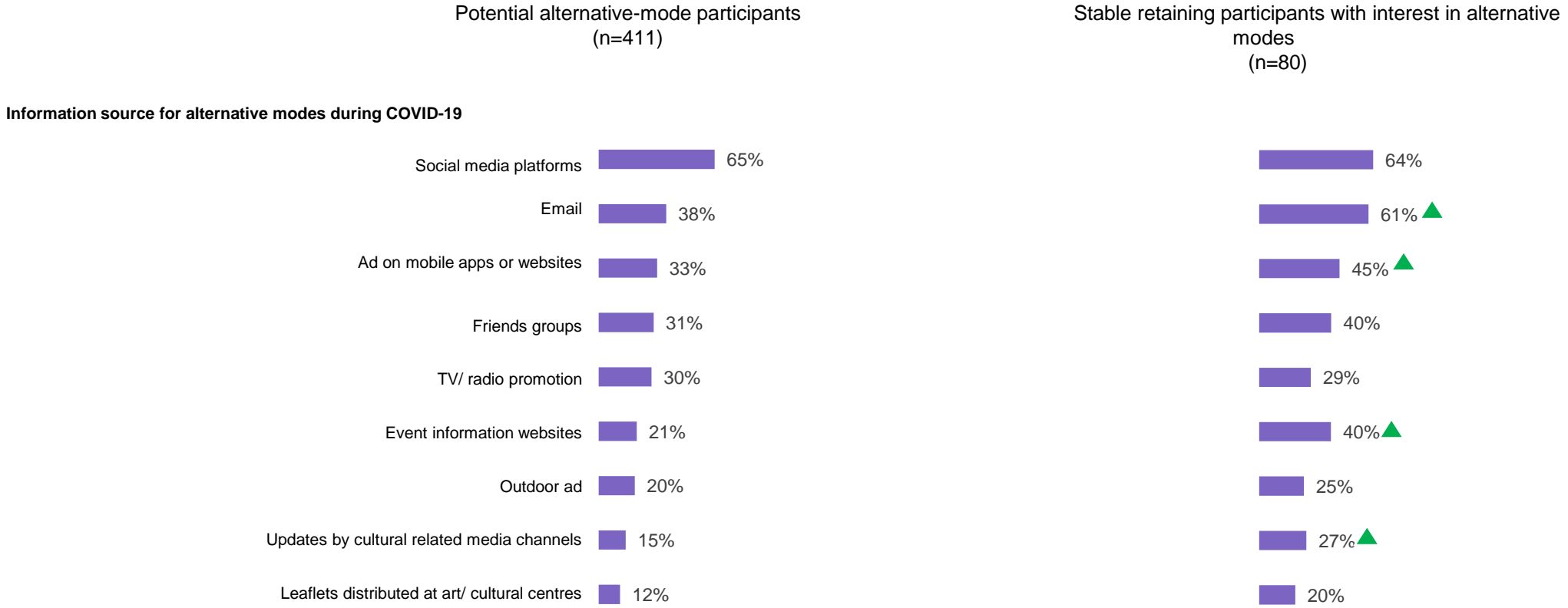
Stable retaining participants with interest in alternative modes
(n=80)



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

Information source for alternative-mode arts programmes during COVID-19 - Stable retaining participants with participation interest at post-COVID-19 period – Literary Activities

- Other than social media platforms, a significant higher proportion of stable retaining participants with interest in alternative modes received arts information from emails (61%) and advertisements on mobile apps/ websites (45%).



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

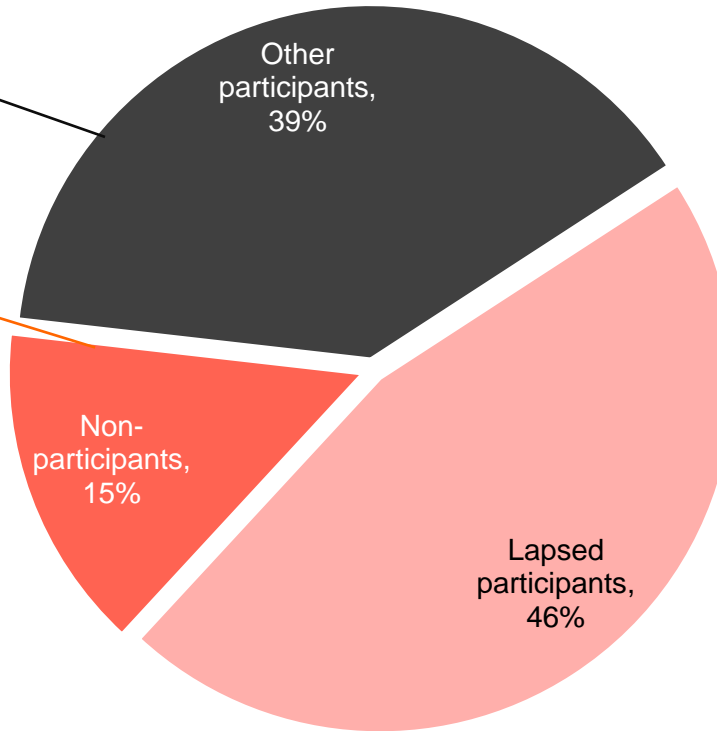
Lapsed and Non-Participants with Participation Interest at Post-COVID-19 Period

Distribution of potential participants by type of participants – Literary Activities

- 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=825 (Ref: Q24a)



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

- Those who claimed interest in
- Physical modes (7%)
 - Alternative modes (10%)

- Those who claimed interest in
- Physical modes (28%)
 - Alternative modes (23%)

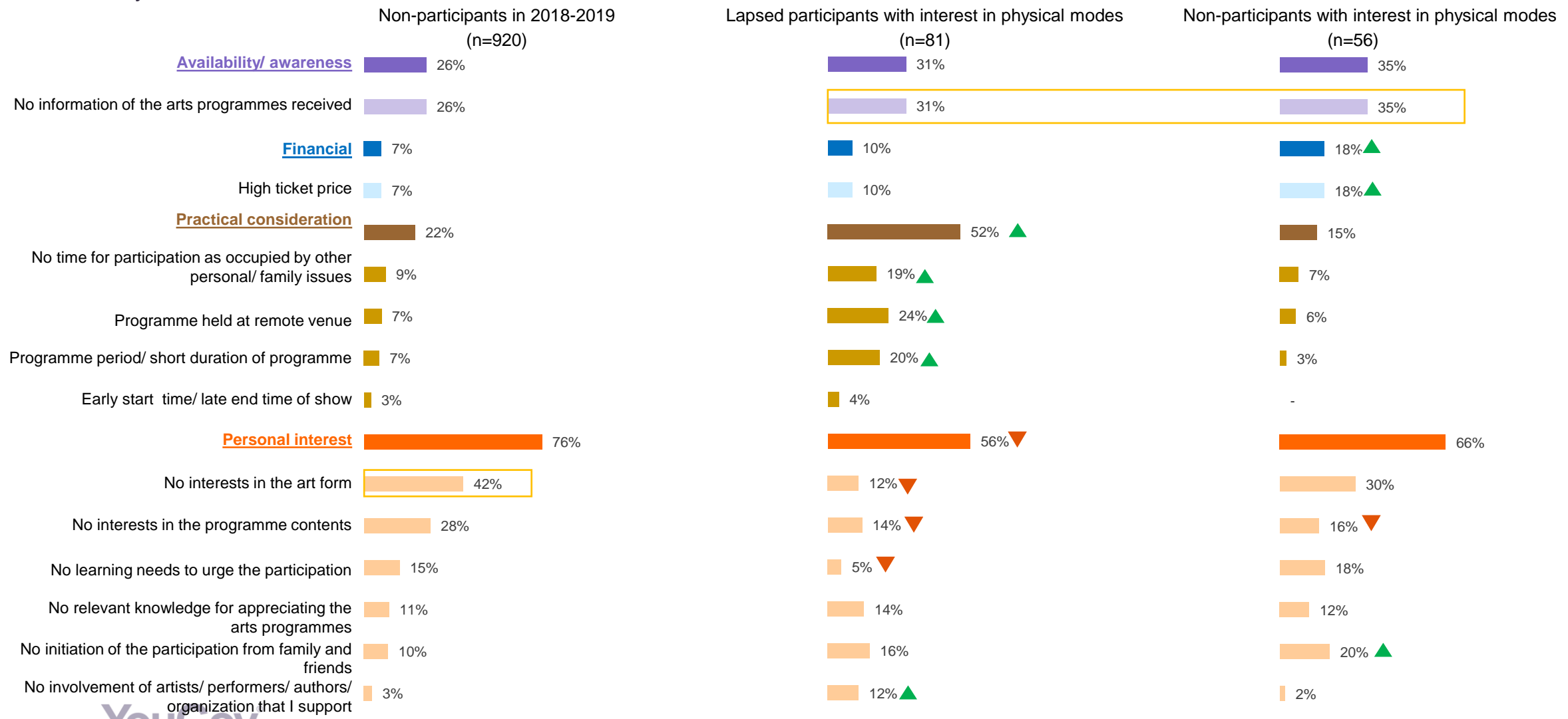
Other observations:

	Potential physical-mode participants	Non-participants with interest in physical modes
Married persons having no children aged < 18	20%	33%
Married persons having children aged < 18	38%	15%
Business owners/ Managers and professionals	18%	9%
Housewives	5%	12%

	Potential alternative-mode participants	Non-participants with interest in alternative modes
Aged 45-54	23%	31%
Aged 55-64	15%	24%
MHI below HKD 30,000	60%	74%
MHI more than HKD 50,000	13%	6%

Reasons for not participating in 2018-2019 - Lapsed and non-participants with participation interest at post-COVID-19 period – Literary Activities

- Lack of programme information was the main barrier for lapsed participants and non-participants in 2018-2019 despite their interest in Literary Activities.



 Top reason

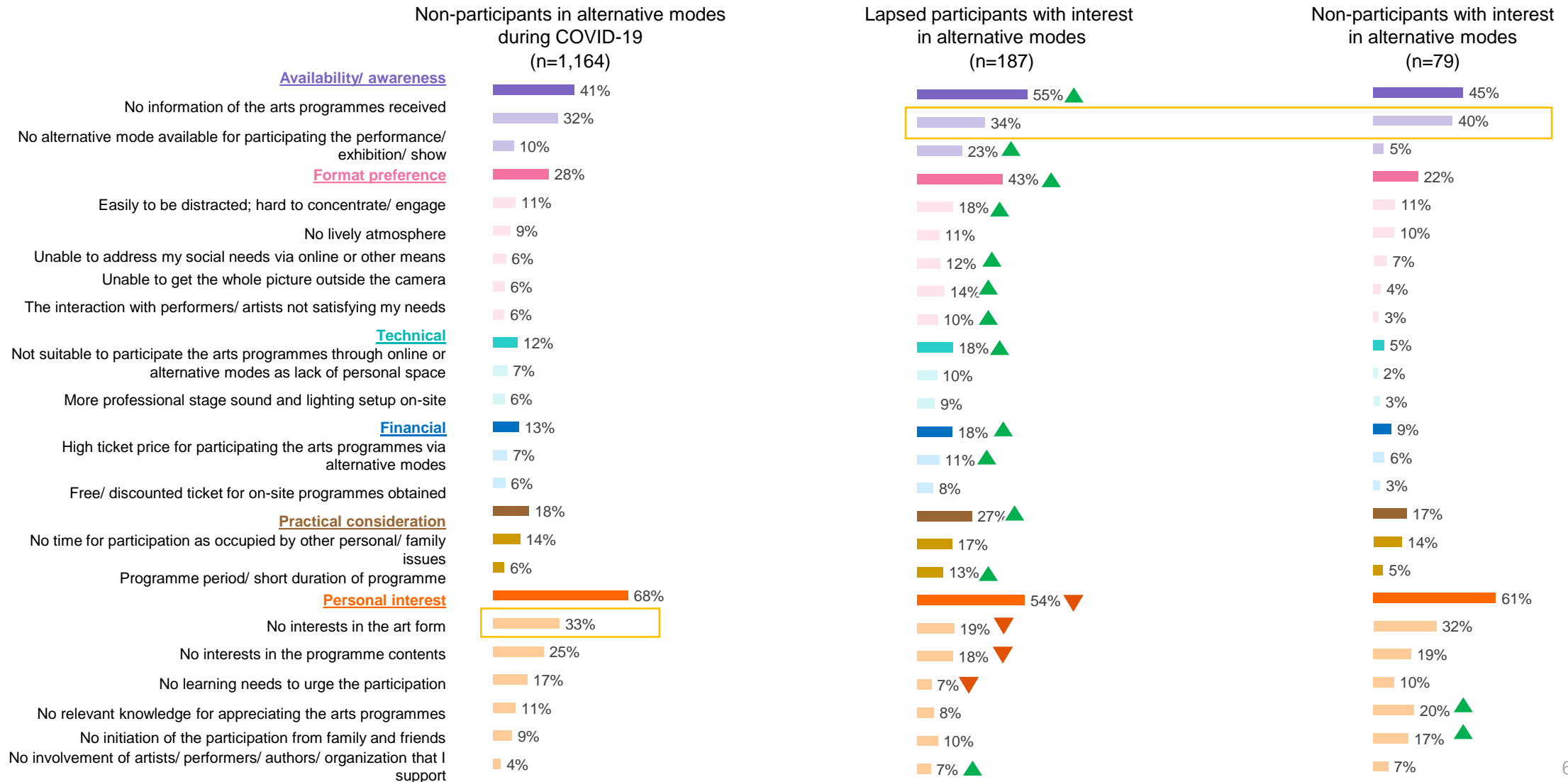


Note: Lapsed participants who have participated in 2018-2019 are excluded from this question, so not all lapsed participants with interest are covered here.
 Base: Non-participants of Literary Activities programme in 2018-2019

▲ ▼ 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 – Literary Activities

- Despite their claimed interest in future alternative-mode programmes, a considerable portion of lapsed participants suggested that they had not participated in alternative-mode Literary Activities during COVID-19 due to the various structural defects of alternative formats.



Base: Non-participants of Literary Activities 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 – Literary Activities

- Relatively speaking, free participation, flexible time and online trailers would have even greater appeal to non-participants with interest in future alternative-mode programmes.

Acceptable price level (Median)
Excluding Free and Not sure

Note: Assuming ticket price HKD50 for in-person admission

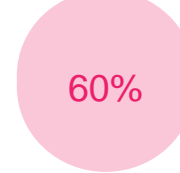
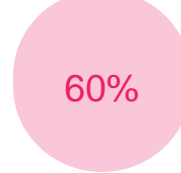
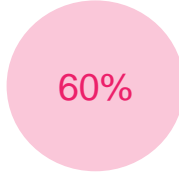
% of physical ticket

Important elements driving alternative modes

Potential alternative-mode participants (n=252)

Lapsed participants with interest in alternative modes (n=99)

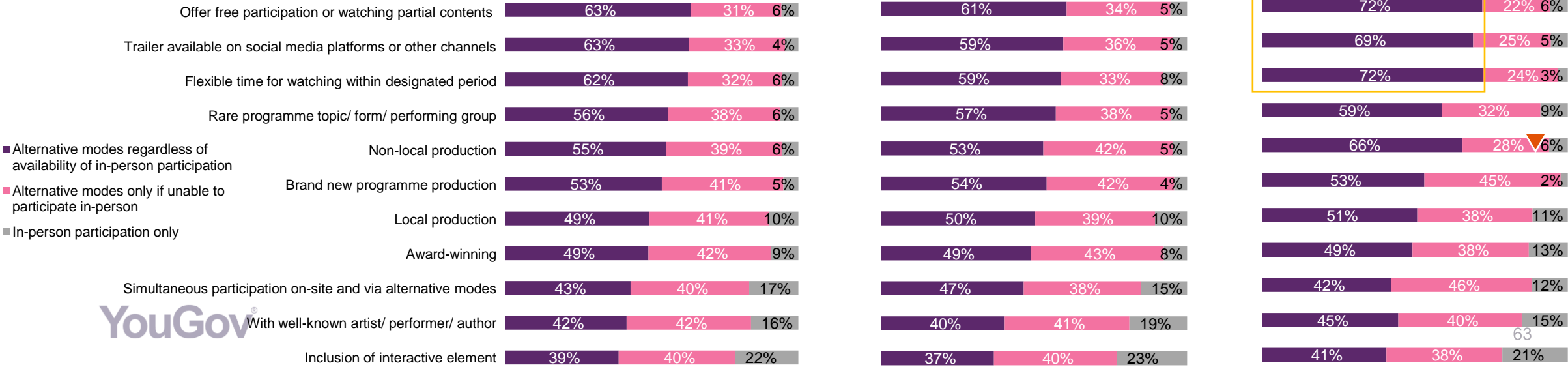
Non-participants with interest in alternative modes (n=45*)



Potential alternative-mode participants (n=443)

Lapsed participants with interest in alternative modes (n=187)

Non-participants with interest in alternative modes (n=79)



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