

# Individual Art Form Analysis - Music

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# Key highlights

- Participation in Music dropped from 29% (in 2018-2019) to 21% (during COVID-19). Comparatively, men had a relatively higher participation rate in Music than women during the epidemic, and nearly 60% of those lapsed participants since COVID-19 were female. Married persons having children aged under 18 were also more active in Music participation both as audience and in other kinds of arts involvement.
- Over 40% of “lapsed participants since COVID-19” had only participated in physical Music programmes in 2018-2019. The lower availability of physical programmes during COVID-19 might be a reason why they ceased participation.
- Almost all Music participants during COVID-19 took part in alternative-mode programmes (93%) whereas the participation share in physical modes dropped from 53% to 18%. Social media platforms (50%) and TV/ radio broadcast (47%) became the two most popular participation channels.
- Compared to physical participation before the epidemic, alternative-mode participation during COVID-19 was notably more frequent and involved more free and non-local productions.
- Claimed interest (68%) in future Music programmes more than doubled the actual participation incidence in past 3 years (Jan 2018 – Jan 2021). The surge was mainly driven by interest growth in physical-mode programmes (from 17% to 42%) , whereas the interest growth in alternative modes was milder (from 27% to 35%).
- Actual participants in past 3 years and potential participants both tended to be married persons having children under 18, with higher education level and household income. In particular, potential alternative-mode participants comprised a higher proportion of blue-collar workers than their physical-mode counterparts.
- 70% of potential participants were lapsed participants or non-participants, and they cited the lack of programme information as a main reason for their non-participation before and during COVID-19. Close to 30% of lapsed participants with claimed interest in physical Music programmes also suggested that the high ticket price had deterred them from participation in 2018-2019.

# 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?

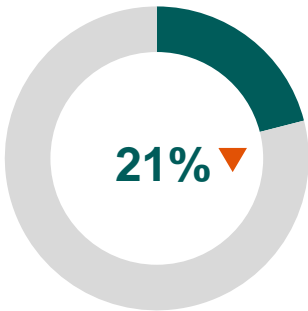
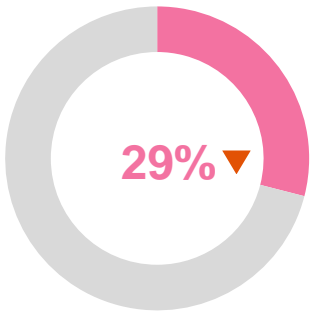
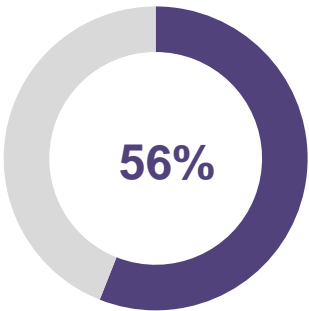
 Ever-Participation	Before 2018	In 2018-2019 (Before COVID-19)	During COVID-19 (Jan 2020 – Jan 2021)
• Retaining participants	✓	✓	✓
• Young participants		✓	✓
• Returning participants	✓		✓
• New participants			✓
• Lapsed participants since COVID-19	✓	✓	
		✓	
• Lapsed participants since 2018	✓		
• Non-participants			

# Arts participation – Music

- Participation in Music programmes dropped from 29% in 2018-2019 to 21% during COVID-19.
- Despite 13% of previous participants having lapsed since the epidemic, 4% resumed participation in the art form again.



### Participation Incidence



### Projected Population

2,413,390

1,246,387

893,720

### Participation Segment

### Projected Population

Participation Segment	Percentage	Projected Population
Total (n=1,500)		
Retaining participants	14%	593,551
Young participants	2%	96,342
Returning participants	4%	155,711
New participants	1%	48,117
Lapsed participants since COVID-19	13%	556,494
Lapsed participants since 2018	28%	1,213,408
Non-participants	39%	1,675,490

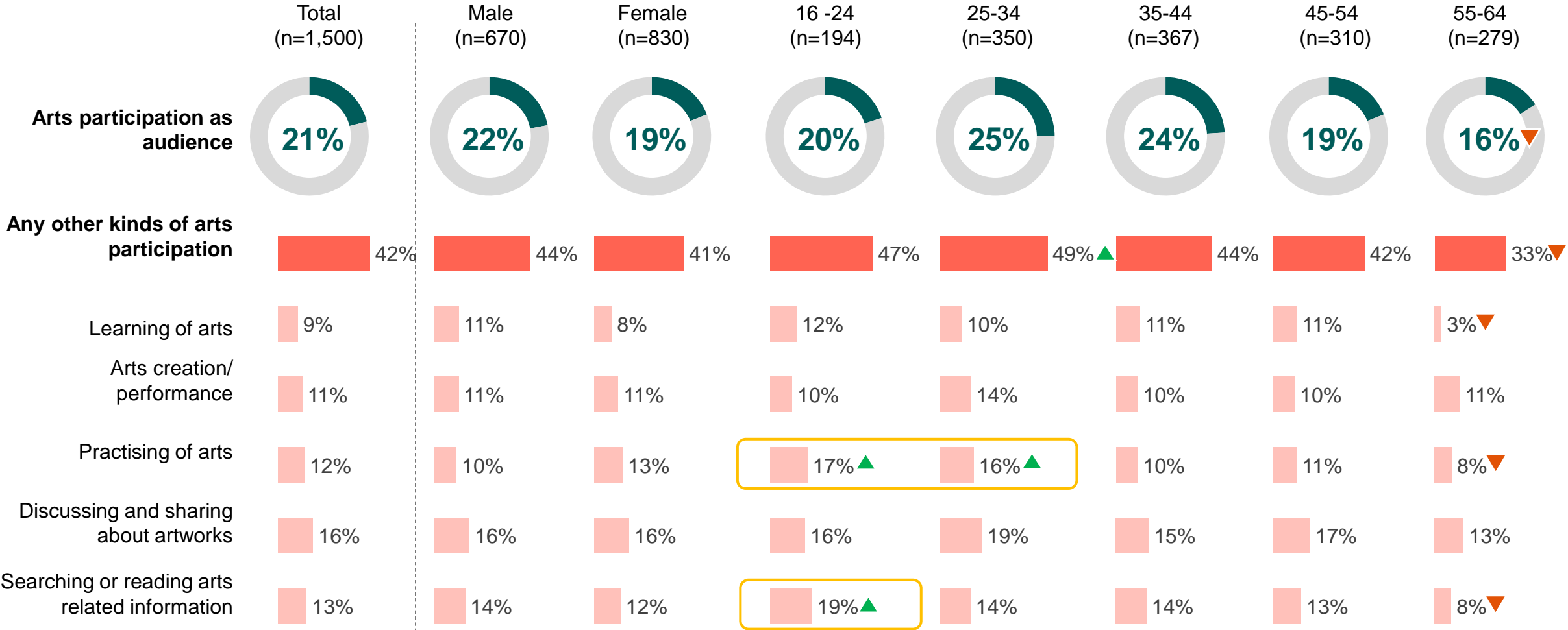


Base: All respondents, n=1,500

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

# All kinds of arts participation during COVID-19 – Music – by demographics

- During COVID-19, people aged 25-34 were relatively more involved in Music especially in terms of arts practice. Those aged 16-24 were also active in practising Music and attaining Music-related information.
- Respondents aged 55-64 were the least active in Music participation both as audience and in other kinds of involvement.



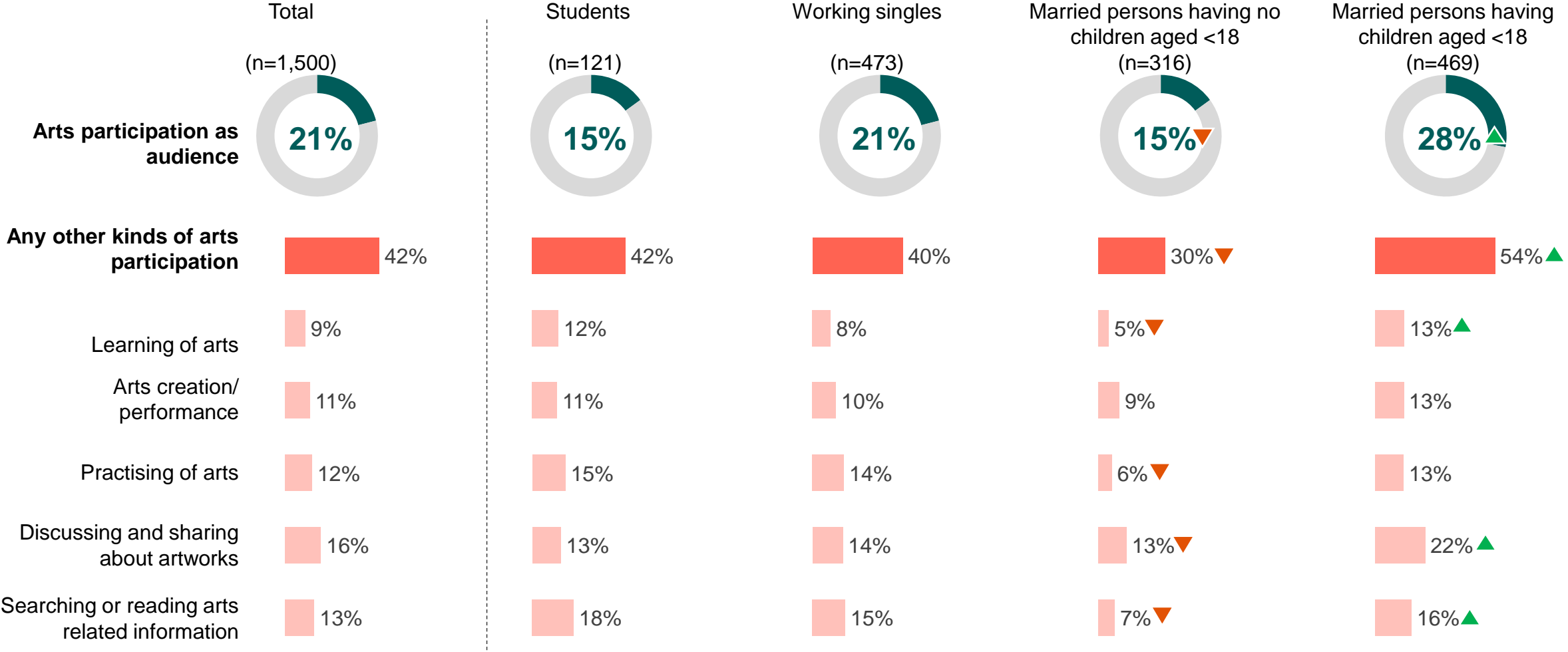
Base: All respondents, n=1,500

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

# All kinds of arts participation during COVID-19 – Music – 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 not only the most active audience in Music programmes, but also involved the most in other kinds of Music activities.



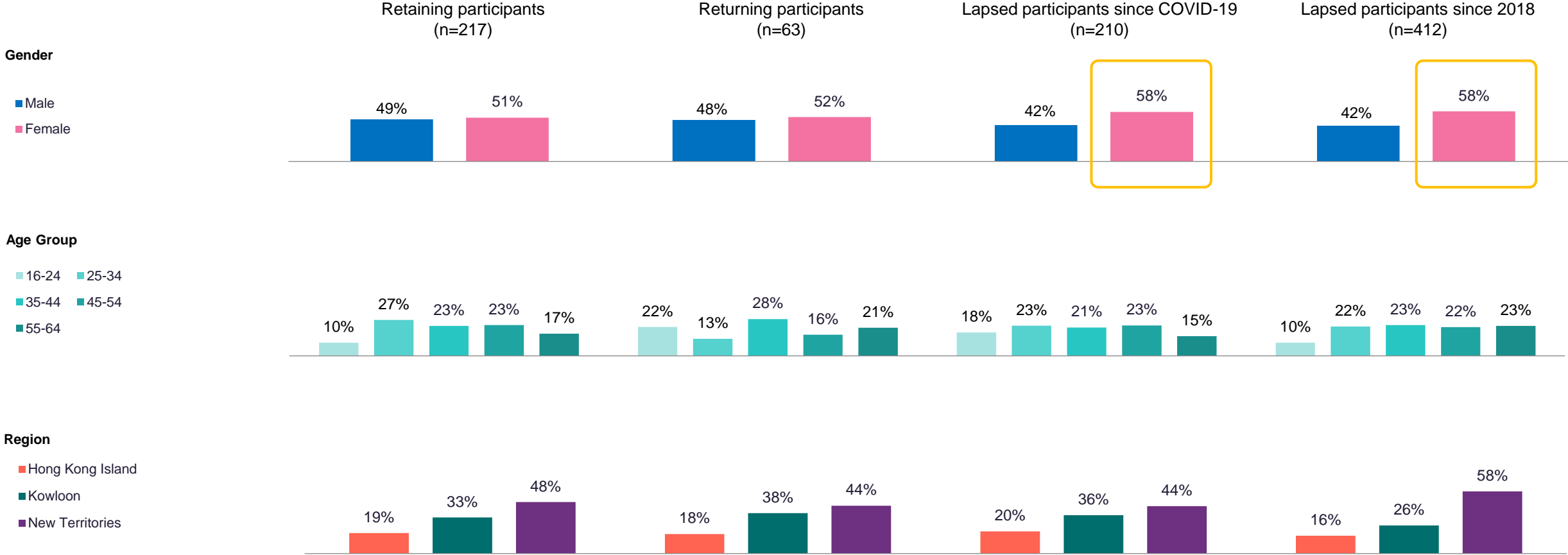
Base: All respondents, n=1,500

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

# Profiles of arts participants – Music

Note to readers: The segments of Young participants (n=25) and New participants (n=21) are not shown due to small base

- Nearly 60% of lapsed participants were female.



# Profiles of arts participants – Music

Note to readers: The segments of Young participants (n=25) and New participants (n=21) are not shown due to small base

- Retaining and returning participants tended to have higher education and household income as compared with lapsed participants.

Retaining participants (n=217)

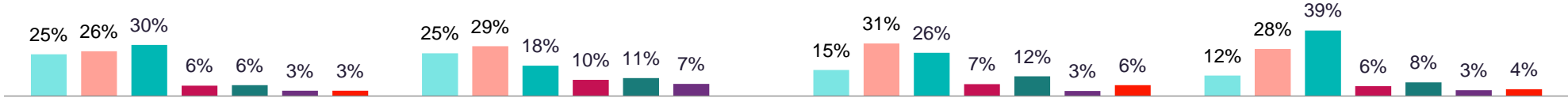
Returning participants (n=63)

Lapsed participants since COVID-19 (n=210)

Lapsed participants since 2018 (n=412)

### 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



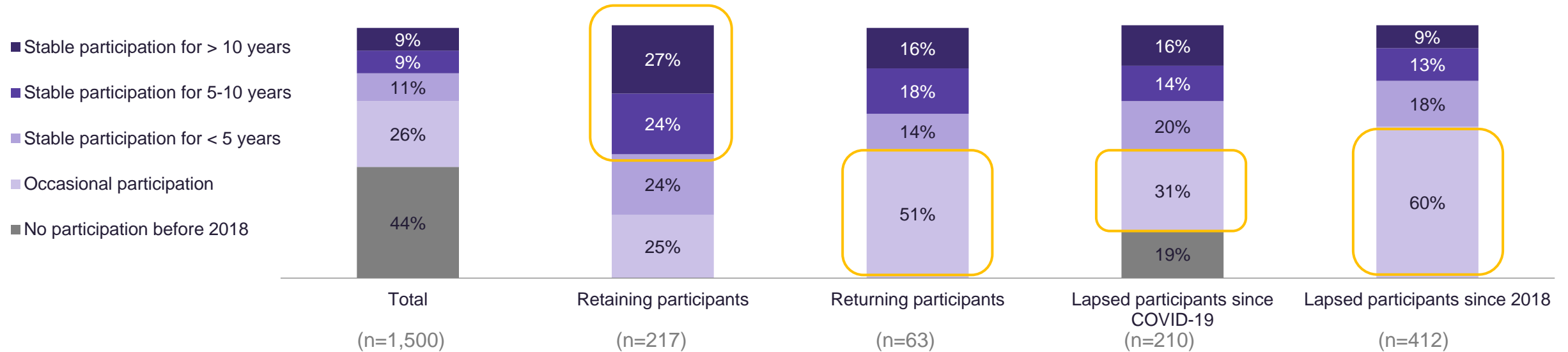


# Arts participation before 2018 – Music

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

- 51% of retaining participants were stable participants for over 5 years before 2018.
- Occasional participants before 2018 would more likely have lapsed at some point of time.

## Participation before 2018

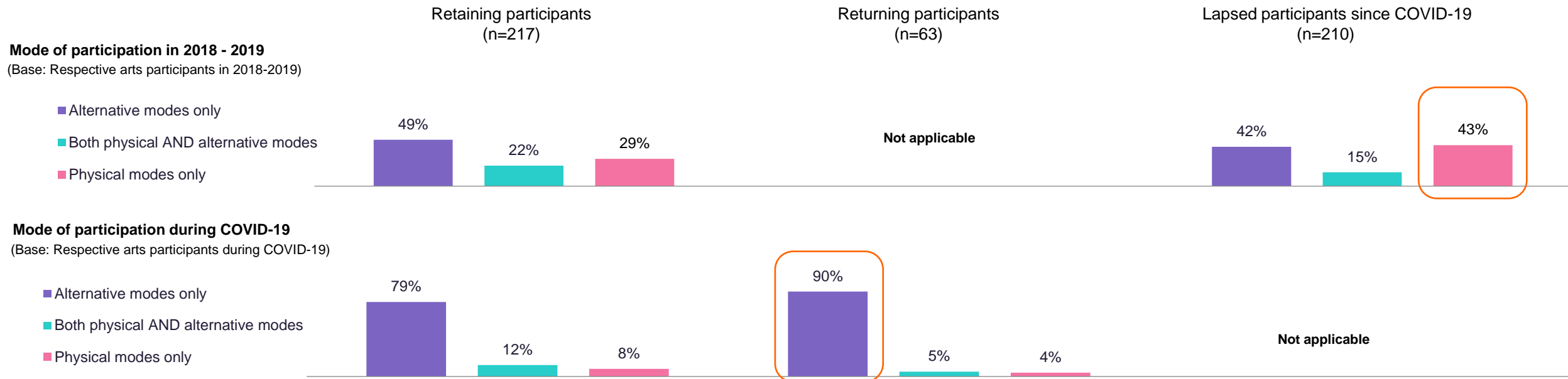


# History of arts participation – Music

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 segments of Young participants (n=25) and New participants (n=21) are not shown due to small base

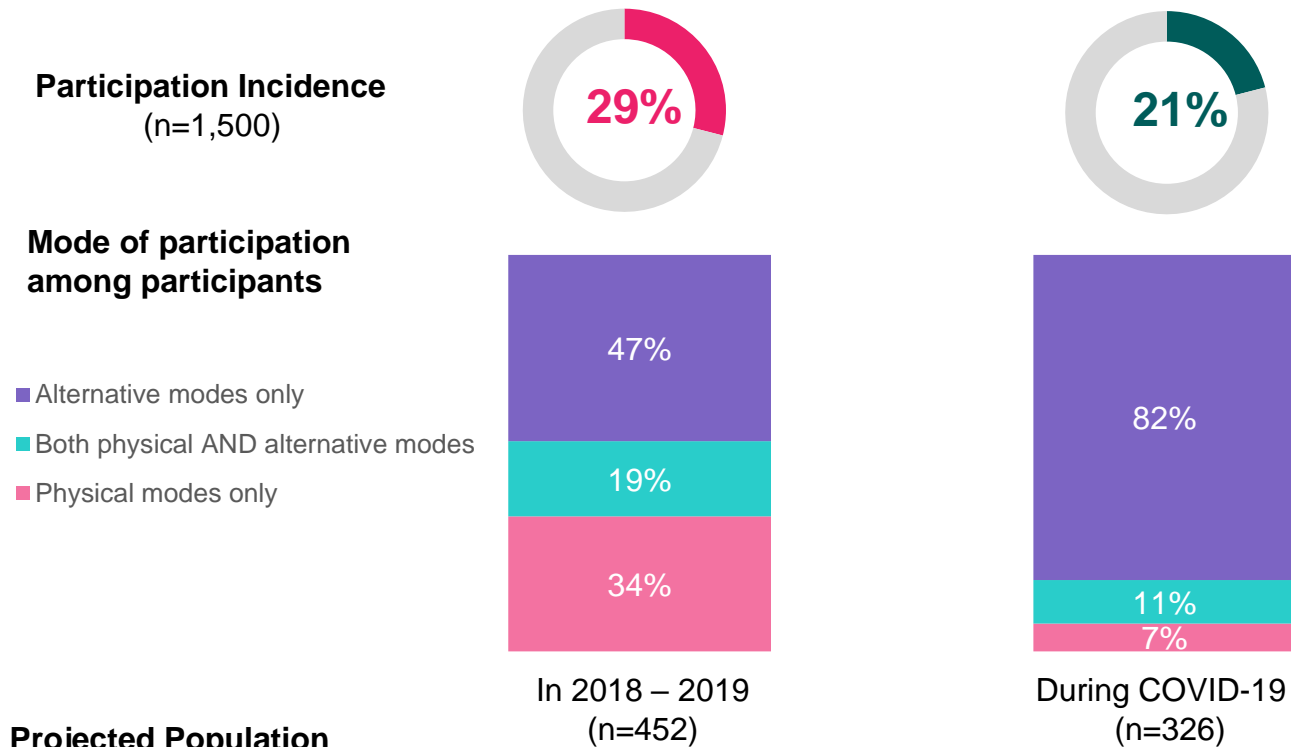
- Over 40% of lapsed participants since COVID-19 had only participated in physical Music programmes in 2018-2019. The lower availability of physical programmes during COVID-19 might be a reason why they ceased participation.
- Alternative modes attracted some respondents to resume participation in Music during COVID-19, with 90% of returning participants taking part in alternative-mode programmes only.

## History of Arts Participation



# Mode of participation among arts participants – Music

- Almost all Music participants during COVID-19 took part in alternative-mode programmes whereas the participation rate in physical modes dropped to 18%.
- The popularity growth in alternative modes was mainly driven by social media platforms and TV/ radio broadcast.



## Projected Population

Mode of Participation	In 2018 – 2019 (n=452)	During COVID-19 (n=326)
Alternative modes only	586,025	730,945
Both physical AND alternative modes	233,673	97,673
Physical modes only	426,688	65,102

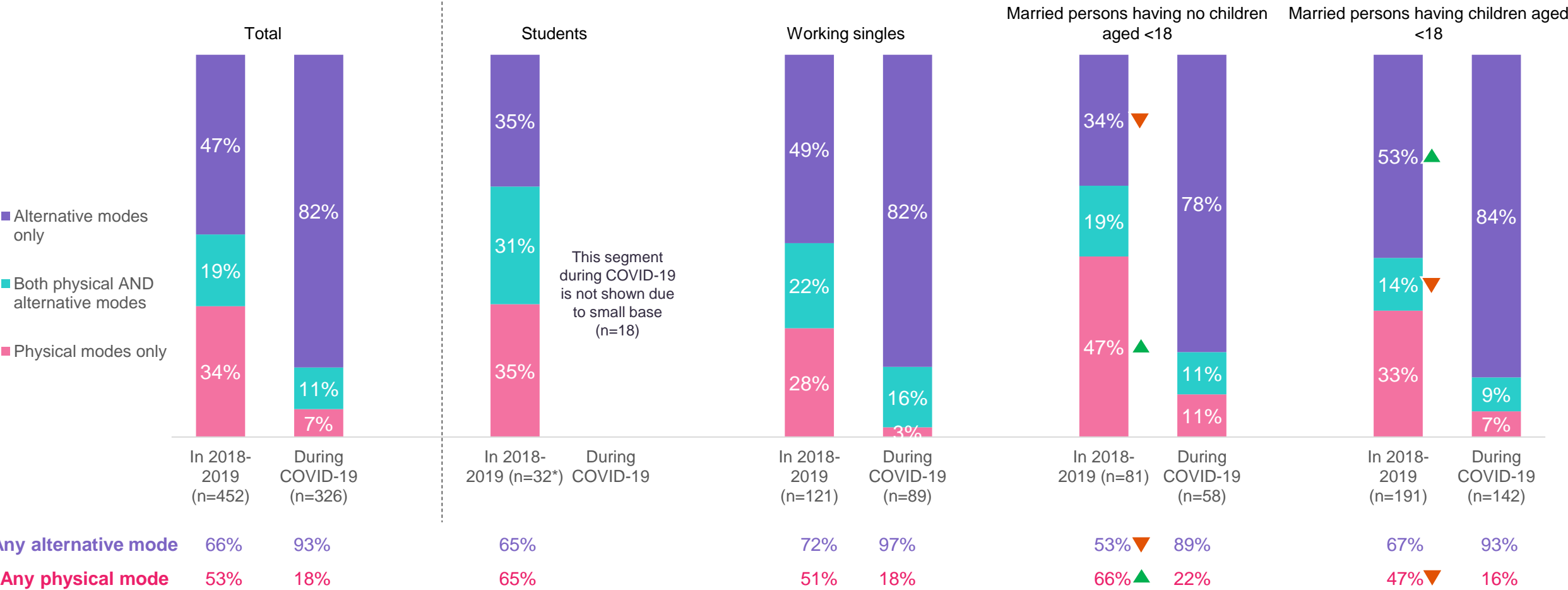


	In 2018 – 2019 (n=452)	During COVID-19 (n=326)
In-person admission	53%	18%
Any alternative mode	66%	93%
TV/ radio broadcast	30%	47%
Paid video-on-demand platforms (e.g. HBO, Netflix)	23%	24%
Social media platforms (e.g. Facebook, YouTube)	32%	50%
Video conferencing app (e.g. Zoom)	8%	16%
Designated official websites	13%	21%
DVD / CD	9%	10%
Via other online channels	8%	10%

# Mode of participation among arts participants – Music – by life segments

Note to readers: The segment of retirees (n=6 in 2018-2019, n=5 during COVID-19) is not shown due to small base

- The adaptation to alternative-mode participation during COVID-19 was observed across different life segments.



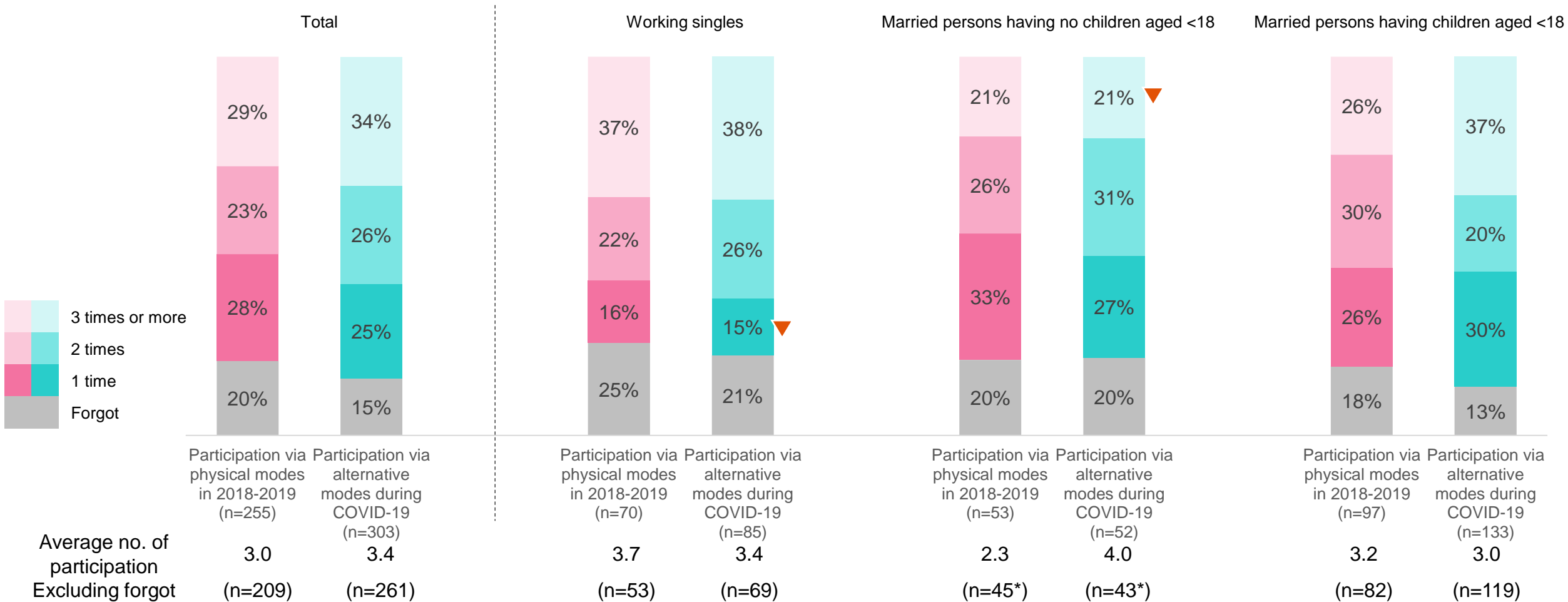
Base: Arts participants of respective art form in 2018-2019 and those during COVID-19

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

# Changing frequency from physical to alternative modes – Music

Note to readers: The segments of students (n=21 in 2018-2019, n=15 during COVID-19) and retirees (n=4 in 2018-2019, n=4 during COVID-19) are not shown due to small base

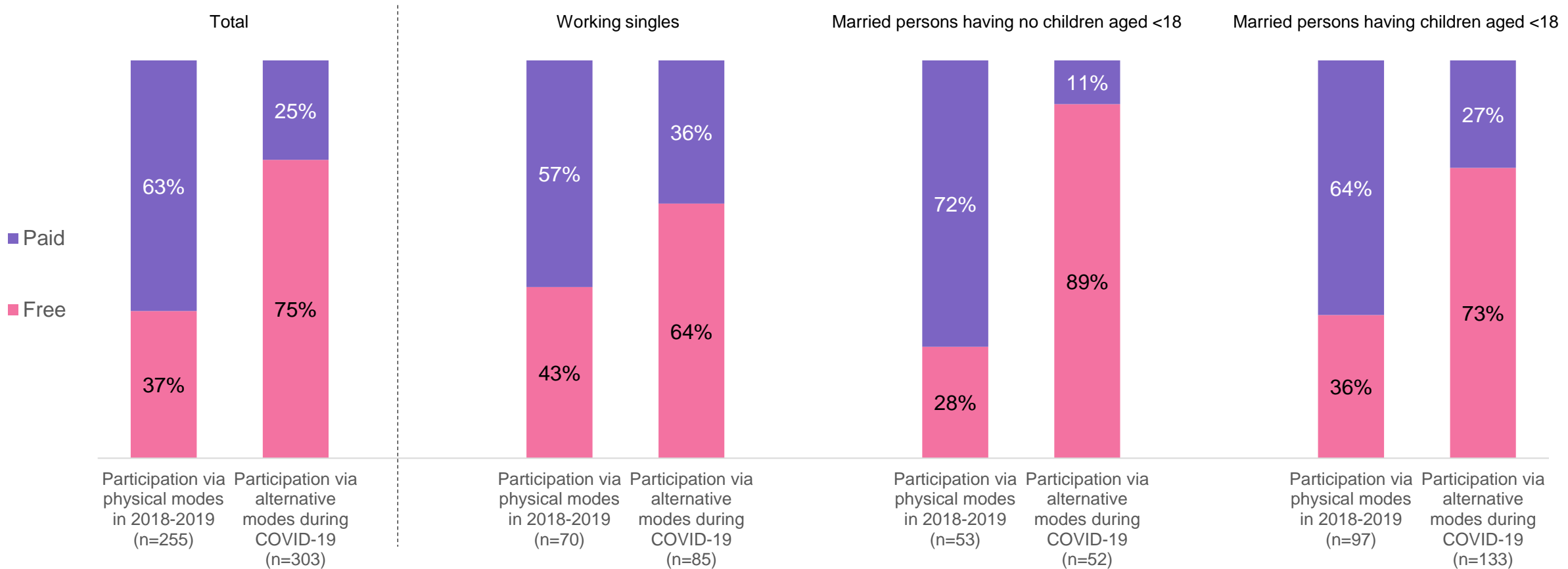
- Compared to physical-mode participation in 2018-2019, alternative-mode participation in Music programmes during COVID-19 was in general getting more frequent.



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

Note to readers: The segments of students (n=21 in 2018-2019, n=15 during COVID-19) and retirees (n=4 in 2018-2019, n=4 during COVID-19) are not shown due to small base

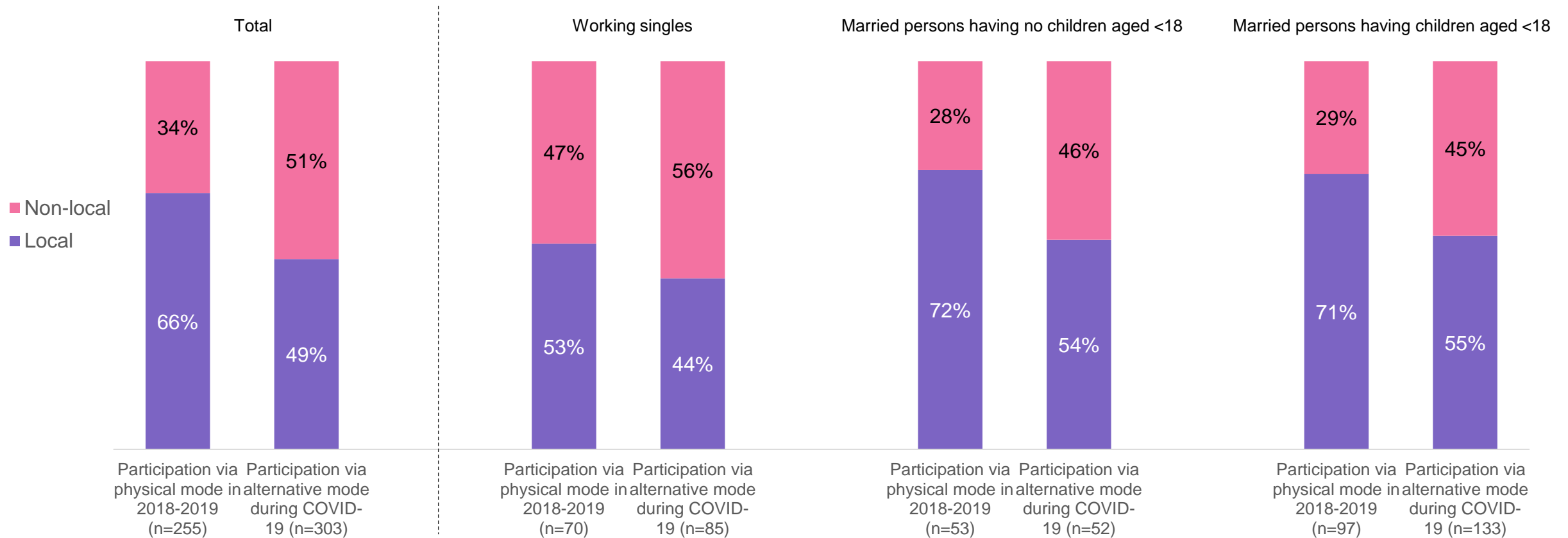
- Alternative-mode participation during COVID-19 was notably more inclined towards free programmes, which might also explain for the higher participation frequency as seen from previous slide.



# Average ratio of participating arts programmes of local/ non-local production – Music

Note to readers: The segments of students (n=21 in 2018-2019, n=15 during COVID-19) and retirees (n=4 in 2018-2019, n=4 during COVID-19) are not shown due to small base

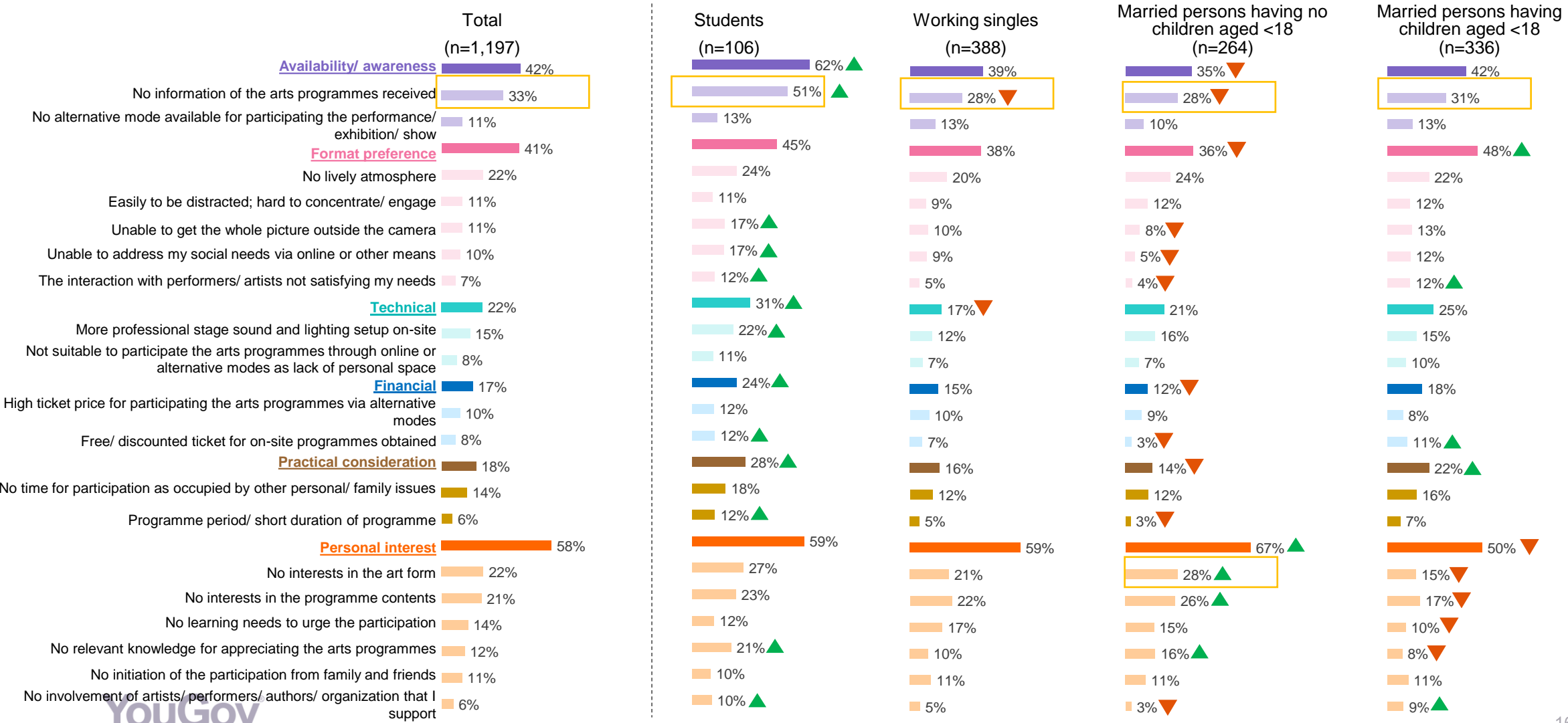
- Compared to physical-mode participation before the epidemic, alternative-mode participants during COVID-19 enjoyed more non-local Music programmes, possibly because alternative modes allowed easier access to overseas productions.



# Reasons for not participating via alternative modes during COVID-19 – Music

Note to readers: The segment of retirees is not shown due to small base (n=22)

- Lack of programme information was a major reason for non-participation in alternative-mode programmes during COVID-19.
- Students also had relatively more concerns about the lack of professional stage sound and lighting setup in alternative-mode participation.



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

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

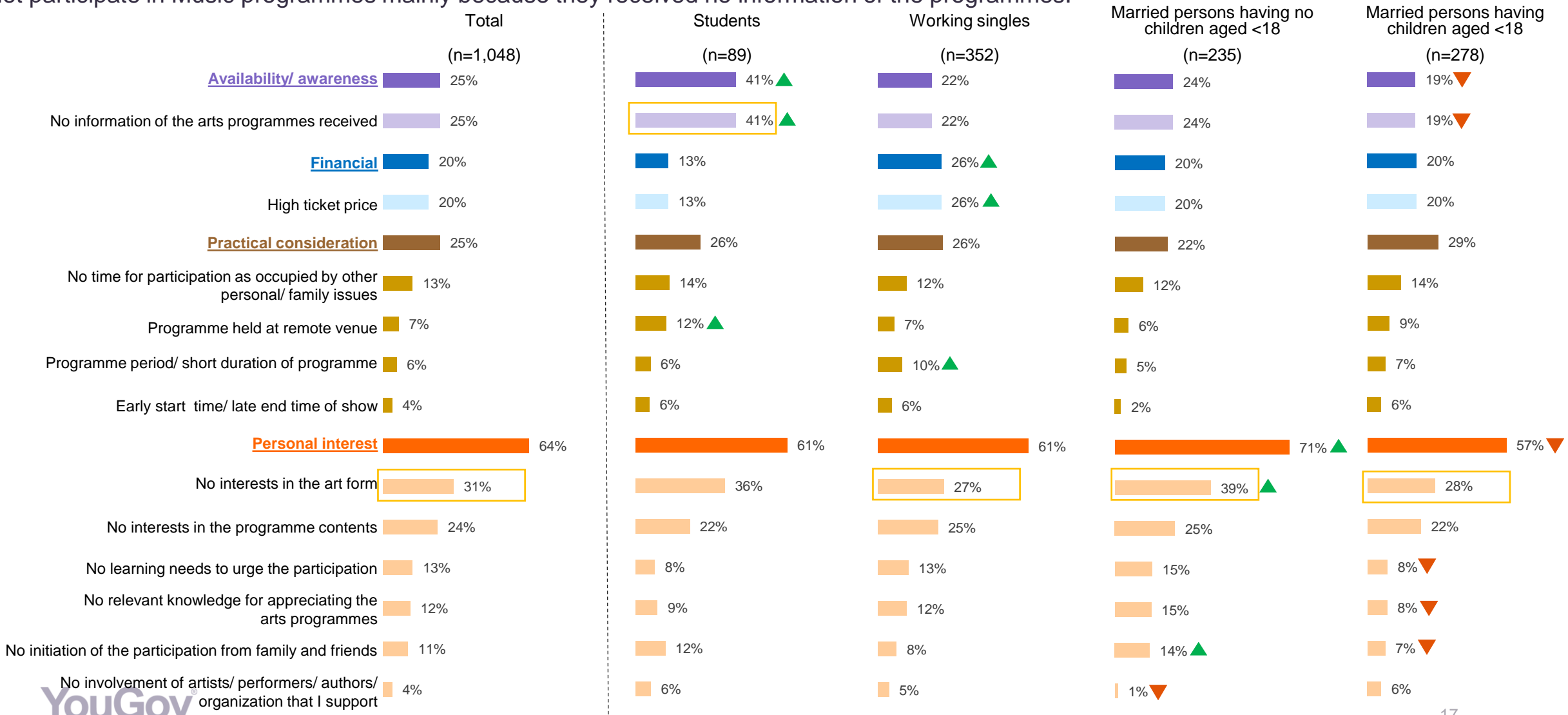
Top reason



# Reasons for not participating in 2018-2019 – Music

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

- By comparison, lack of interest in the art form was a more dominant reason for non-participation in 2018-2019, except for students who did not participate in Music programmes mainly because they received no information of the programmes.



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

   Top reason

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

## Music

直播時鏡頭與音樂的互動良好的話會很加分

Female, aged 30

可以先報名再提供一些prereading材料

Female, aged 46

Professional vocalist performance tutorials

Male, aged 45

音樂體驗的導向部分也是值得留意的，即是簡評或解說

Female, aged 26

直播情況許可，但需考慮音質問題，提供播放器材的建議給觀眾，欣賞較佳的演出

Female, aged 23

可增加更多的視覺藝術元素，若果只有聲音的話會較沉悶

Female, aged 16

Introduction of music history and the song creation

Male, aged 62

如果參與人數足夠，可以考慮在不同地域的社區會堂做直播，可確保音質，亦可減低傳播風險

Male, aged 21

可於不同時段表演，方便觀眾能配合自己的時間觀賞

Female, aged 41

於現場各區域收錄表演後，根據現場觀看的區域座位收費去設立網上觀看的收費。

Female, aged 28

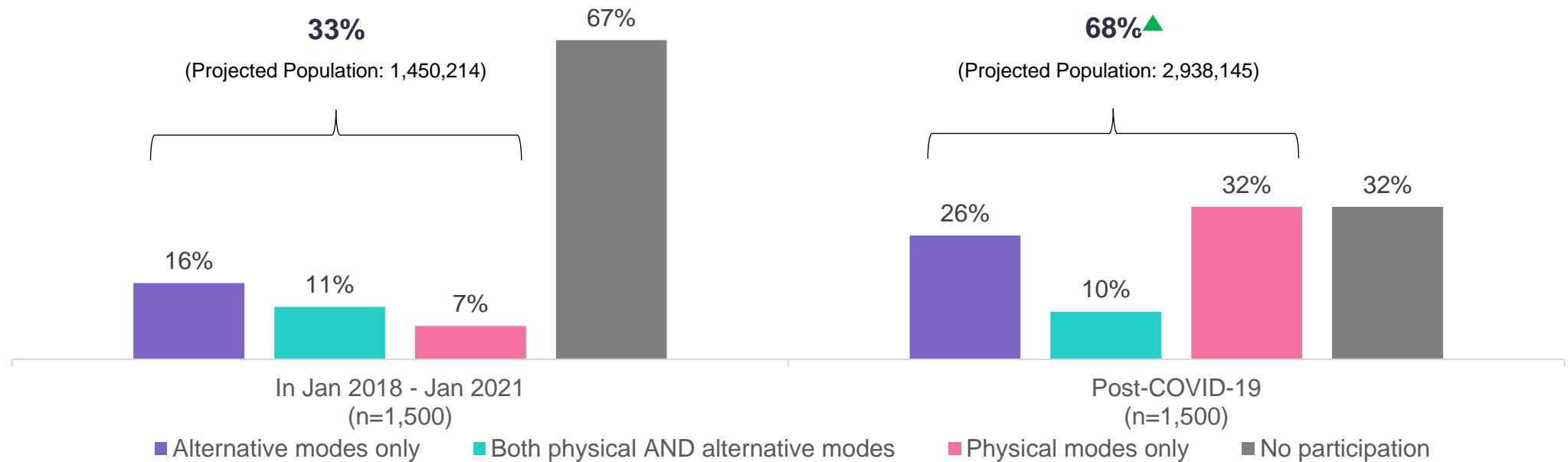
表演者可選擇在室外表演，更可選擇有更好的環境，這樣才令直播有價值

Female, aged 48

# **Potential Participants of Music**

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

- 68% of respondents expressed interest in future Music programmes, more than double the actual participation incidence (33%) in the art form in recent years.
- Interest in physical participation would surge from 17% to 42%, whereas interest in alternative modes would grow relatively milder from 27% to 35%.



	In Jan 2018 - Jan 2021	Projected Population	Post-COVID-19	Projected Population
<b>Any alternative mode</b>	27%	1,167,549	35%	1,540,131
<b>Any physical mode</b>	17%	740,326	42%	1,827,908



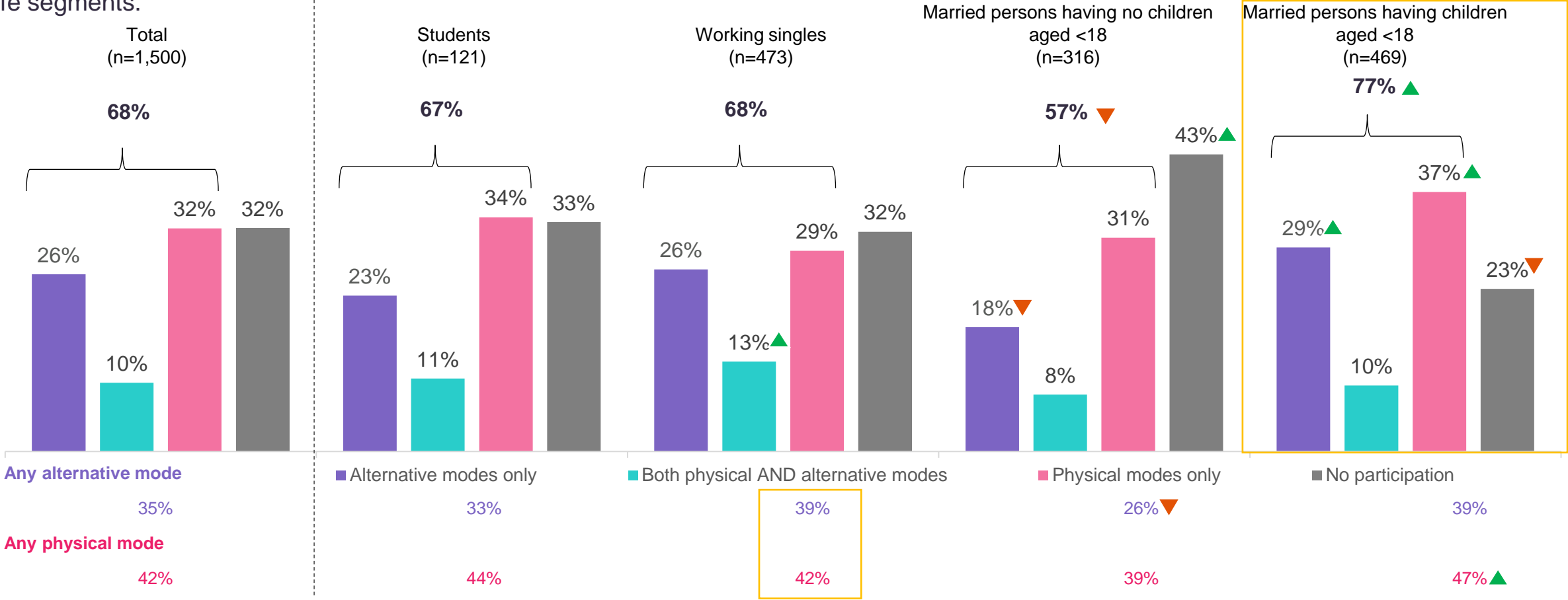
Base: All respondents, n=1,500

▲ ▼ 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 – Music – by life segments

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

- The interest in post-COVID-19 participation was significantly strong among married persons having young children, and nearly half of them would consider physical participation.
- The percentages of potential physical- and alternative-mode participants were relatively close among working singles as compared to other life segments.

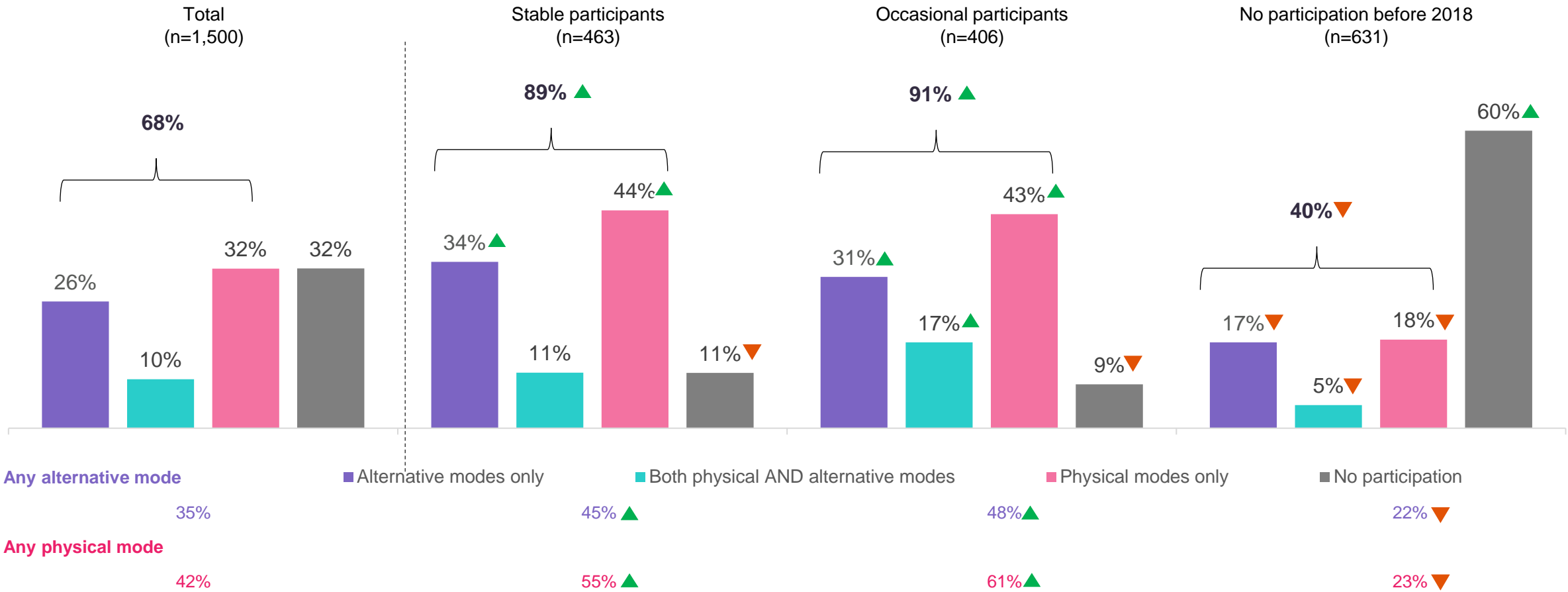


Base: All respondents, n=1,500

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

# Claimed interest in arts participation at post-COVID-19 Period – Music – by participation frequency

- While both stable and occasional participants before 2018 were similarly likely to participate in future Music programmes, occasional participants were relatively more 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

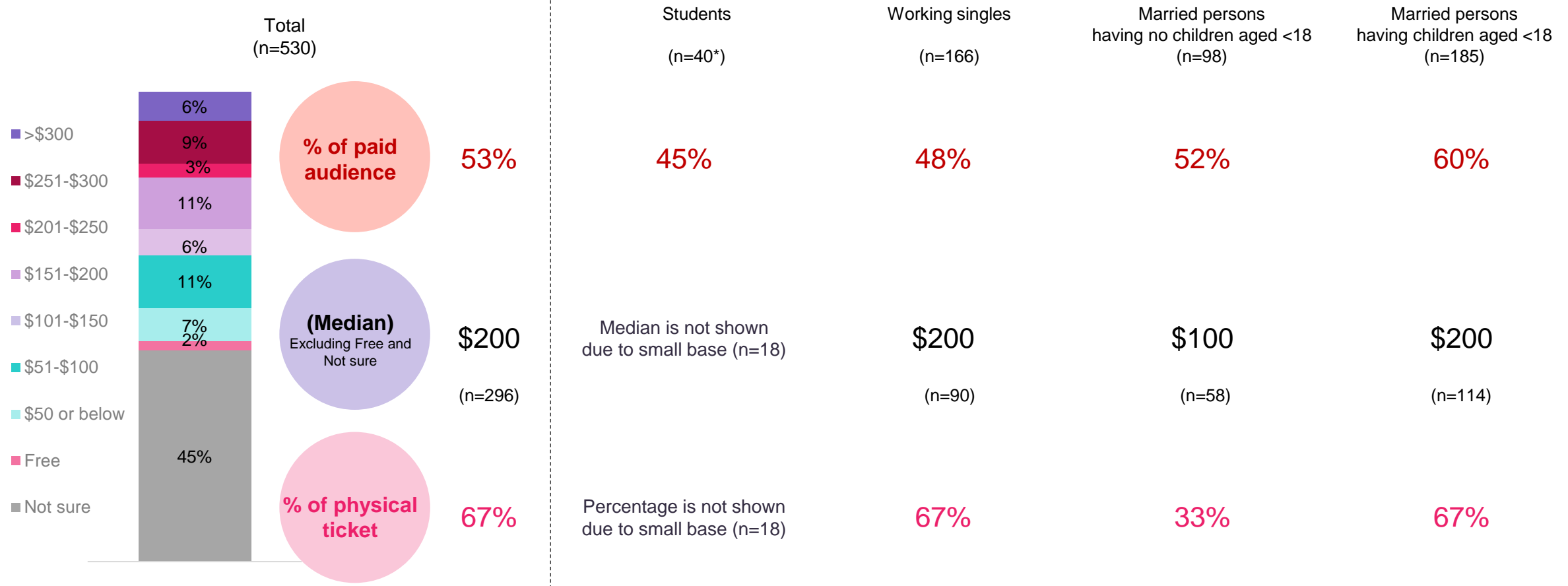
Base: All respondents, n=1,500

▲▼ 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 – Music – by life segments

Note to readers: The segment of retirees (n=6) is not shown due to small base  
 Assuming ticket price HKD300 for in-person admission

- Slightly over half of potential alternative-mode participants were willing to pay for alternative modes at post-COVID-19 period, and they typically expected an alternative-mode Music programme to be one-third cheaper than the same programme in physical mode.
- Married persons having no children under 18 would expect even greater discount for alternative-mode participation.



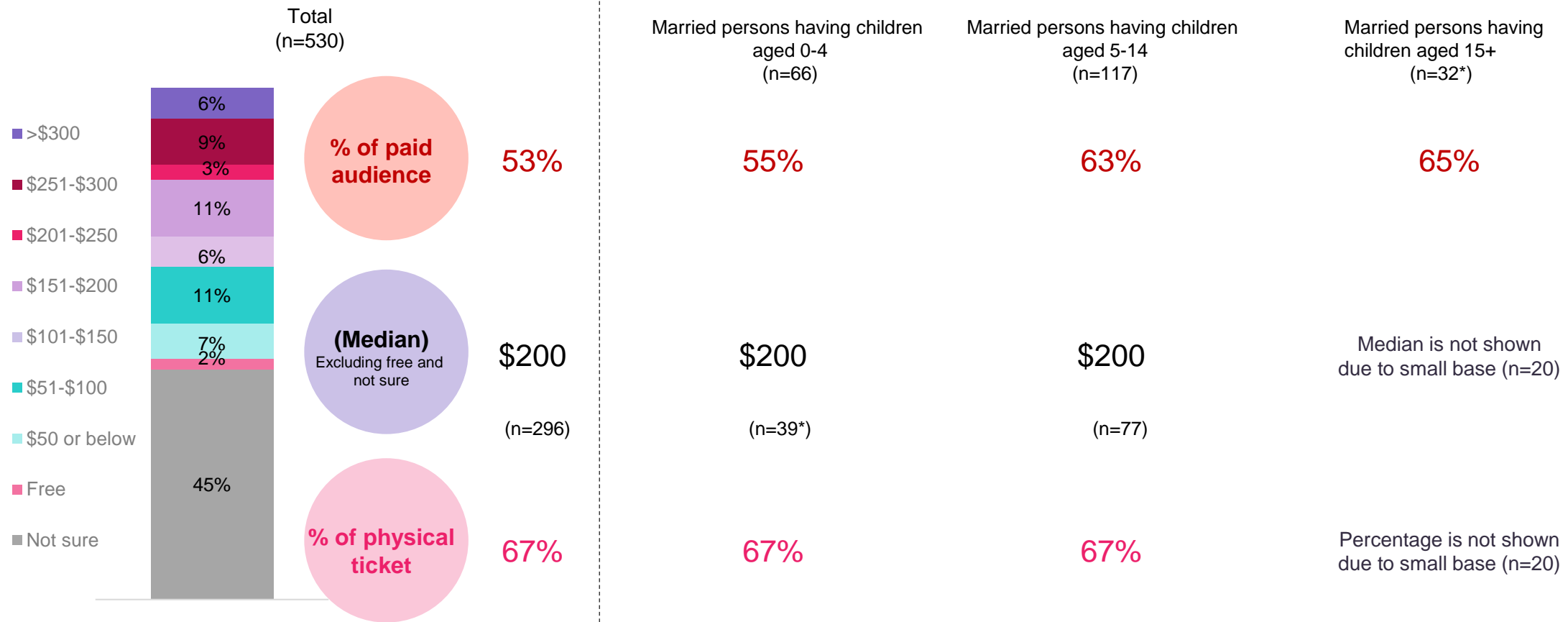
Base: Those consider alternative modes for participating respective art forms at post-COVID-19

▲ ▼ 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 – Music – by life segments

Assuming ticket price HKD300 for in-person admission

- The older their children were, the more willing married persons having children would be to pay for alternative-mode Music programmes.

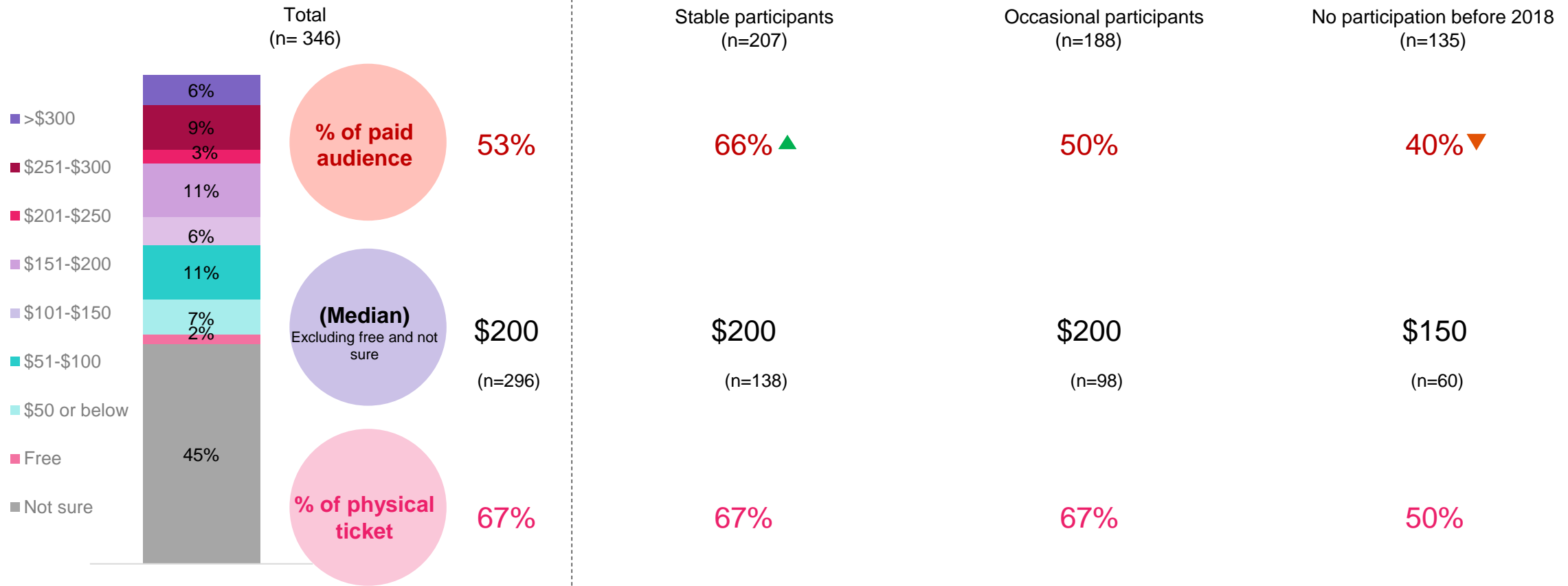




# Acceptable price level for arts participation via alternative modes at post-COVID-19 period – Music – by participation frequency

Assuming ticket price HKD300 for in-person admission

- A significantly higher proportion of stable participants before 2018 would be willing to pay for alternative-mode Music 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

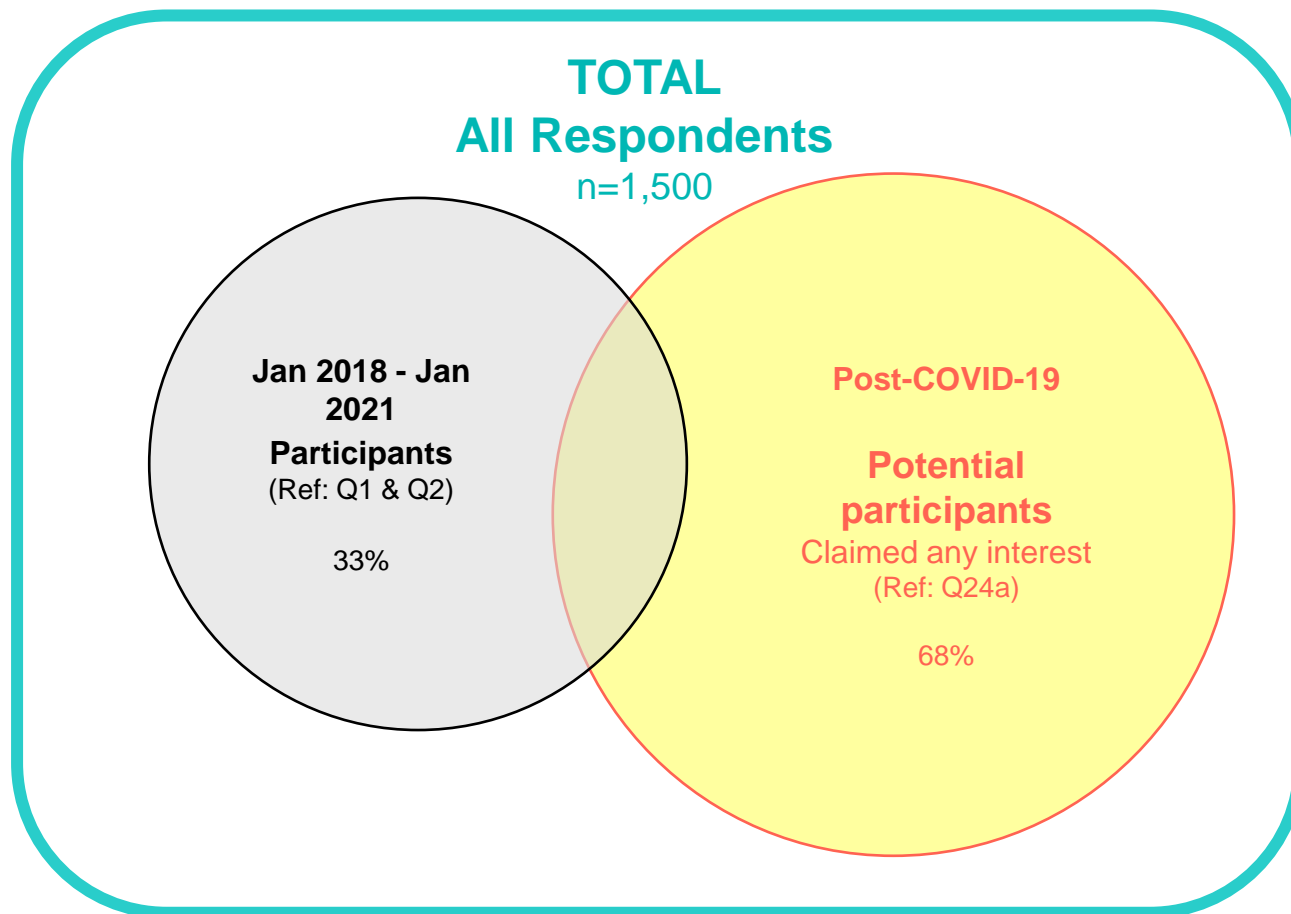
Base: Those consider alternative modes for participating respective art forms at post-COVID-19

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

# **Profiles of Potential Participants of Music**

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

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



# Profiles of potential participants - Music

- Potential participants at post-COVID-19 period were skewed towards female and young adults aged 25-34. They tended to be married persons having children under 18 who were better educated and had higher household income.

	Total (n=1,500)	Participants in Jan 2018 – Jan 2021 (n=536)	Potential participants (n=1,040)
<b>Gender</b>			
Male	44%	46%	43% ▼
Female	56%	54%	57% ▲
<b>Age Group</b>			
16-24	13%	14%	13%
25-34	20%	23% ▲	22% ▲
35-44	22%	24%	23%
45-54	22%	21%	23%
55-64	23%	17% ▼	19% ▼
<b>Occupation</b>			
Business owners/ Managers and professionals	14%	20% ▲	16% ▲
White-collar	27%	28%	27%
Blue-collar	34%	29% ▼	33%
Housewives	7%	7%	7%
Students	9%	9%	9%
Retirees	3%	3%	2% ▼
Unemployed	5%	4%	4% ▼
<b>Life Segment</b>			
Students	9%	9%	9%
Working singles	22%	21%	22%
Married persons having no children aged <18	24%	19% ▼	20% ▼
Married persons having children aged <18	32%	42% ▲	36% ▲
<b>Education Level</b>			
Secondary or below	45%	36% ▼	40% ▼
Post-secondary / University	55%	64% ▲	60% ▲
<b>Monthly Household Income</b>			
Below HKD 30,000	64%	58% ▼	60% ▼
HKD 30,000 - 49,999	24%	27% ▲	27% ▲
More than HKD 50,000	12%	15% ▲	14% ▲

	Total (n=1,500)	Participants in Jan 2018 – Jan 2021 (n=536)	Potential participants (n=1,040)
<b>Region &amp; living district</b>			
Hong Kong Island	17%	19%	17%
Central & Western	3%	4%	3%
Eastern	8%	9%	8%
Southern	4%	4%	4%
Wan Chai	2%	3% ▲	2%
Kowloon	30%	37% ▲	31%
Kowloon City	6%	8% ▲	6%
Kwun Tong	8%	11% ▲	9%
Sham Shui Po	6%	8% ▲	6%
Wong Tai Sin	6%	4% ▼	5%
Yau Tsim Mong	4%	7% ▲	5%
New Territories	53%	44% ▼	52%
Kwai Tsing	7%	5% ▼	6%
North	5%	4%	5%
Sai Kung	7%	8%	7%
Sha Tin	8%	7%	9%
Tai Po	4%	3%	4%
Tsuen Wan	4%	3% ▼	4%
Tuen Mun	8%	7%	6% ▼
Yuen Long	8%	5% ▼	8%
Islands	3%	3%	3%

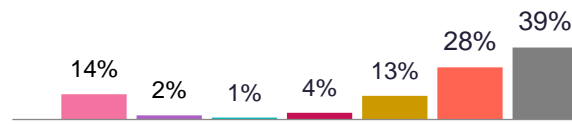
# Profiles of potential participants - Music

- Over half of the potential participants were lapsed participants, meaning that they were still interested in Music programmes despite their non-participation in this art form recently. (See slides 46-47 for reasons of non-participation of these lapsed participants)

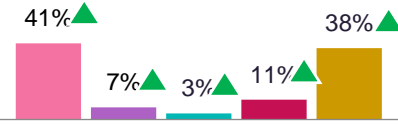
## Distribution of segments

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

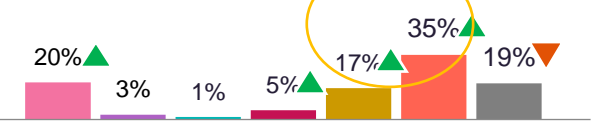
Total  
(n=1,500)



Participants in Jan 2018 – Jan 2021  
(n=536)

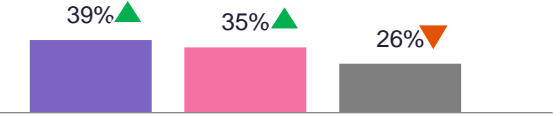
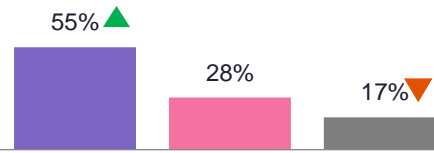
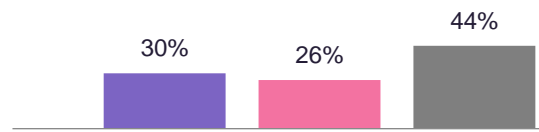


Potential participants  
(n=1,040)



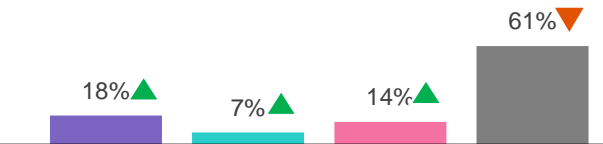
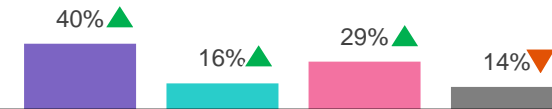
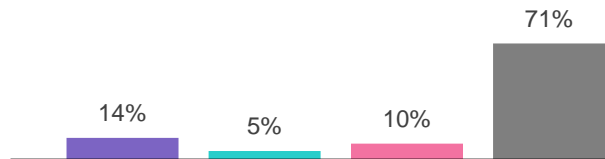
## Participation before 2018

- Stable participation
- Occasional participation
- No participation



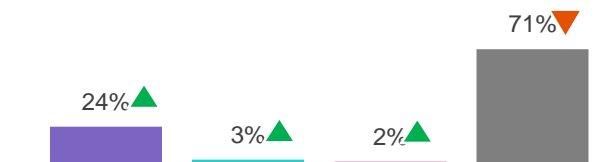
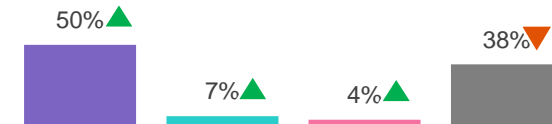
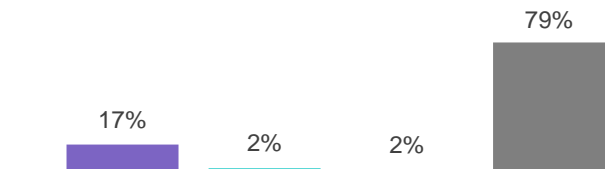
## Mode of participation in 2018 – 2019

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



## Mode of participation during COVID-19

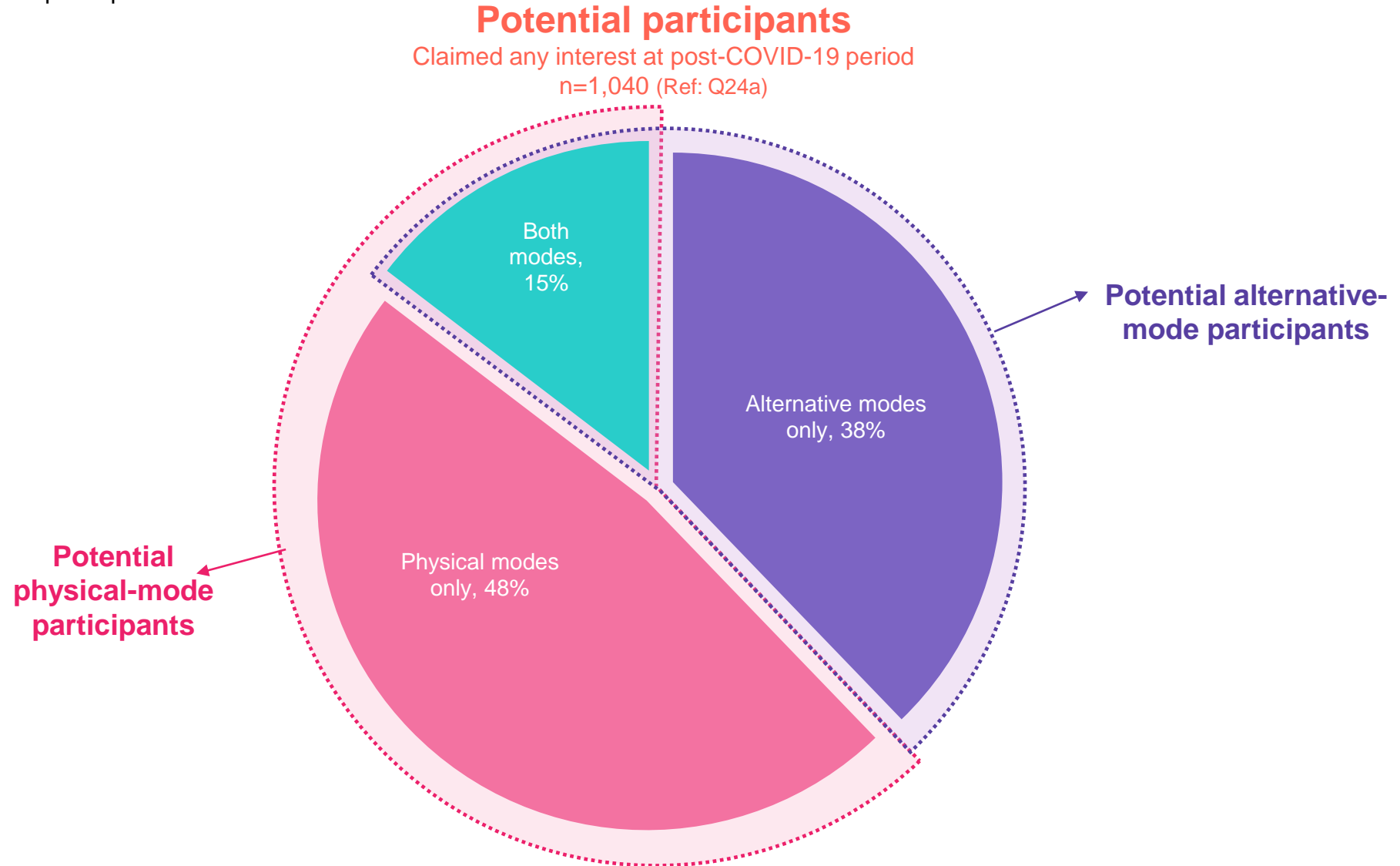
- Alternative modes only
- Both physical AND alternative modes
- Physical modes only
- No participation



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

# Distribution of potential participants by mode preference - Music

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



# Profiles of potential participants – Music – by mode of participation

- The profiles of potential physical-mode participants and potential alternative-mode participants were largely similar, except that the former had a higher proportion of married persons having no young children whereas the latter was more skewed towards blue-collar workers.

	Potential participants (n=1,040)	Potential physical-mode participants (n=672)	Potential alternative-mode participants (n=530)
<b>Gender</b>			
Male	43%	42%	43%
Female	57%	58%	57%
<b>Age Group</b>			
16-24	13%	15%	12%
25-34	22%	21%	22%
35-44	23%	21%	24%
45-54	23%	25%	22%
55-64	19%	19%	20%
<b>Occupation</b>			
Business owners/ Managers and professionals	16%	16%	18%
White-collar	27%	30%	25%
Blue-collar	33%	30%	38%
Housewives	7%	7%	6%
Students	9%	10%	9%
Retirees	2%	3%	2%
Unemployed	4%	4%	3%
<b>Life Segment</b>			
Students	9%	10%	9%
Working singles	22%	22%	25%
Married persons having no children aged <18	20%	22%	18%
Married persons having children aged <18	36%	36%	35%
<b>Education Level</b>			
Secondary or below	40%	37%	42%
Post-secondary / University	60%	63%	58%
<b>Monthly Household Income</b>			
Below HKD 30,000	60%	59%	62%
HKD 30,000 - 49,999	27%	27%	25%
More than HKD 50,000	14%	15%	13%

	Potential participants (n=1,040)	Potential physical-mode participants (n=672)	Potential alternative-mode participants (n=530)
<b>Region &amp; living district</b>			
Hong Kong Island	17%	19%	15%
Central & Western	3%	4%	2%
Eastern	8%	9%	8%
Southern	4%	5%	2%
Wan Chai	2%	2%	2%
Kowloon	31%	29%	35%
Kowloon City	6%	7%	5%
Kwun Tong	9%	9%	11%
Sham Shui Po	6%	7%	7%
Wong Tai Sin	5%	3% ▼	7%
Yau Tsim Mong	5%	4%	5%
New Territories	52%	52%	51%
Kwai Tsing	6%	6%	7%
North	5%	5%	5%
Sai Kung	7%	7%	6%
Sha Tin	9%	8%	8%
Tai Po	4%	4%	4%
Tsuen Wan	4%	5%	3%
Tuen Mun	6%	7%	6%
Yuen Long	8%	7%	8%
Islands	3%	2%	4%



# Profiles of potential participants – Music – by mode of participation

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

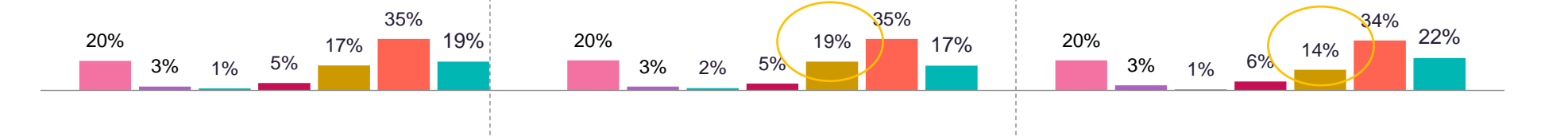
## Distribution of segments

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

Potential participants  
(n=1,040)

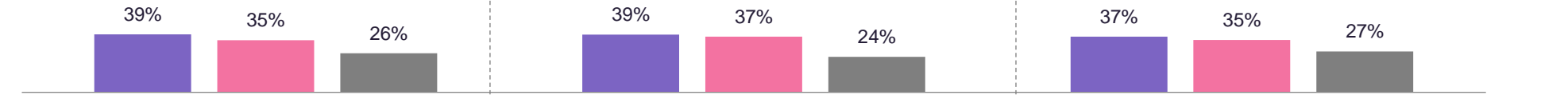
Potential physical-mode participants  
(n=672)

Potential alternative-mode participants  
(n=530)



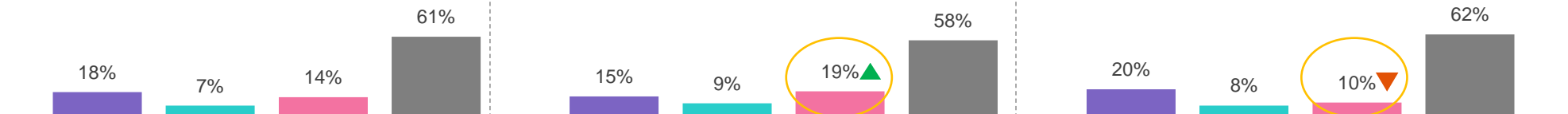
## Participation before 2018

- Stable participation
- Occasional participation
- No participation



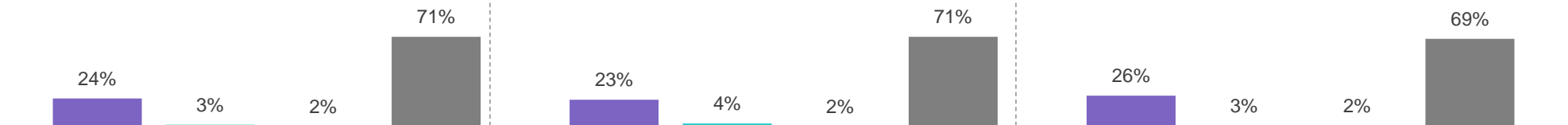
## Mode of participation in 2018 – 2019

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



## Mode of participation during COVID-19

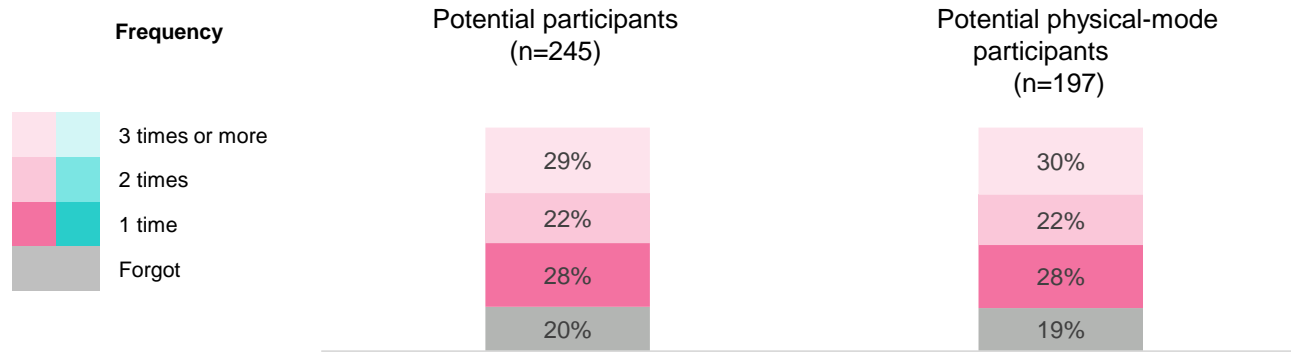
- Alternative modes only
- Both physical AND alternative modes
- Physical modes only
- No participation



# Profiles of potential participants – Music – by mode of participation

- Among the potential alternative-mode participants, their frequency of participation in alternative-mode Music programmes during COVID-19 was higher than all potential participants.

**Participation via physical modes in 2018-2019**

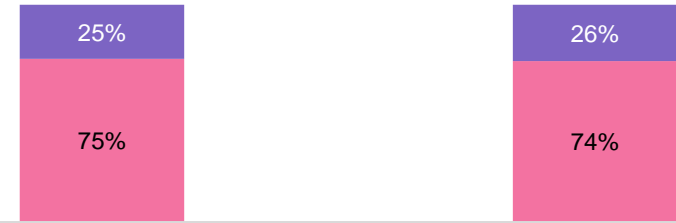


**Participation via alternative modes during COVID-19**



**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.

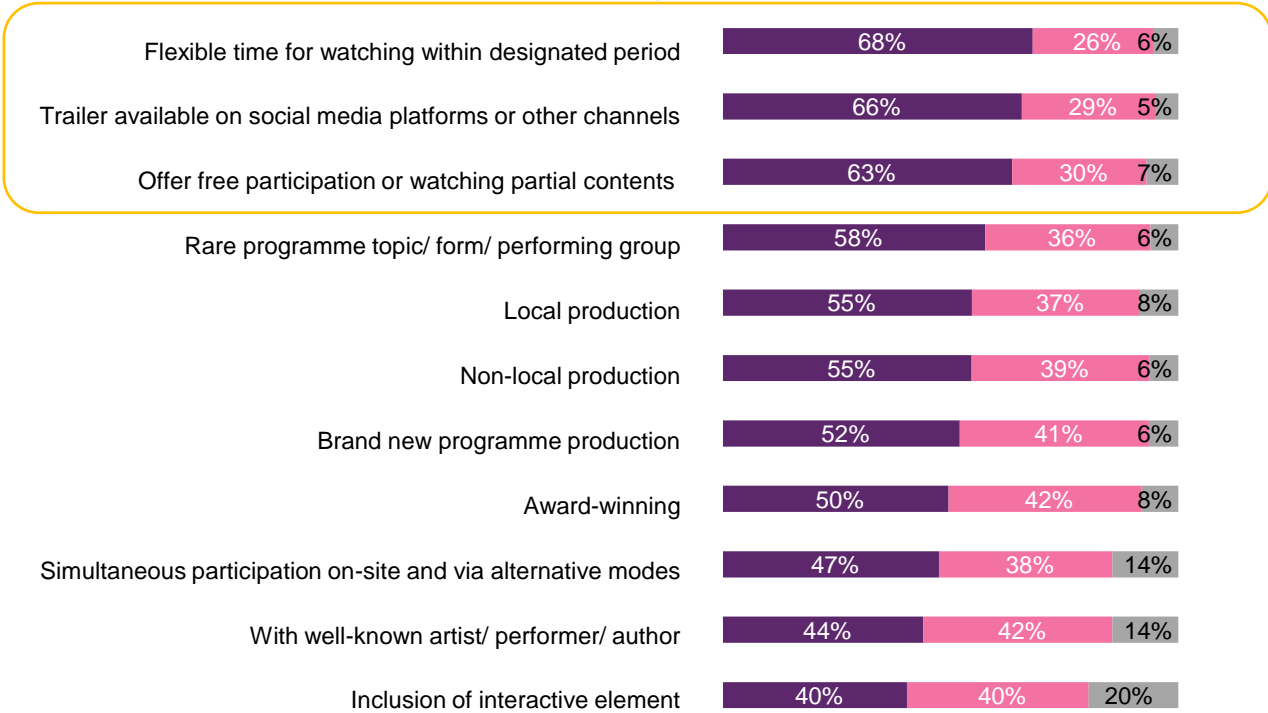
# Profiles of potential participants – Music – important elements and information source for alternative modes

- Flexible show time, trailers on social media platforms and free participation were the top drivers of alternative-mode programmes.
- Social media platforms (68%) were the main source of information channel for alternative-mode programmes, followed by advertisements on mobile apps or websites (34%).

## Important elements driving alternative modes

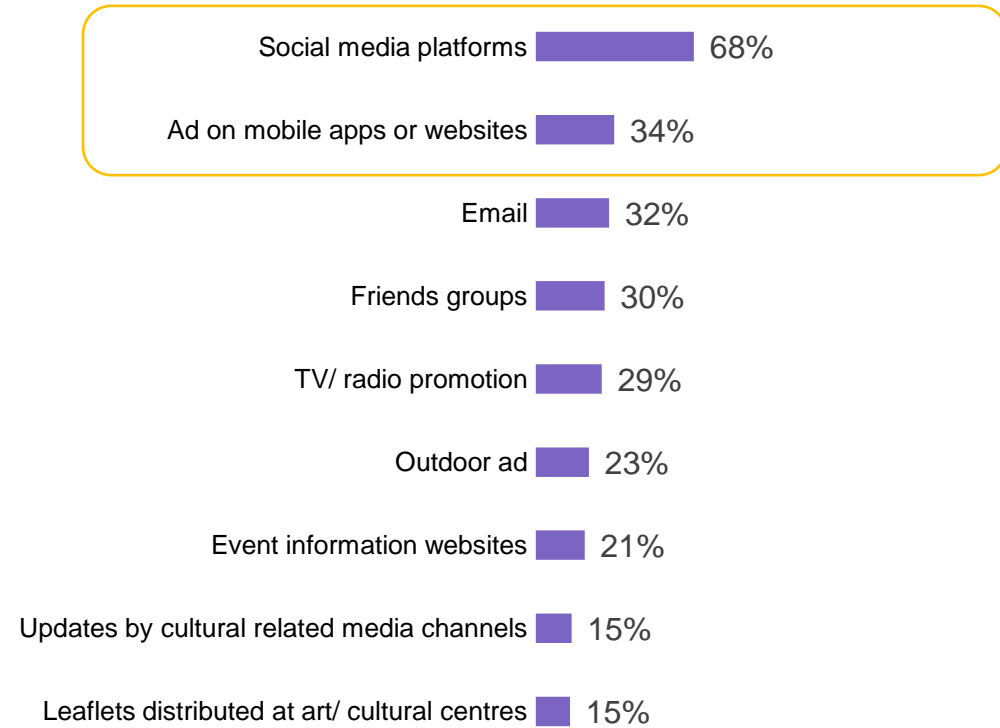
Potential alternative-mode participants (n=530)

- 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=466)

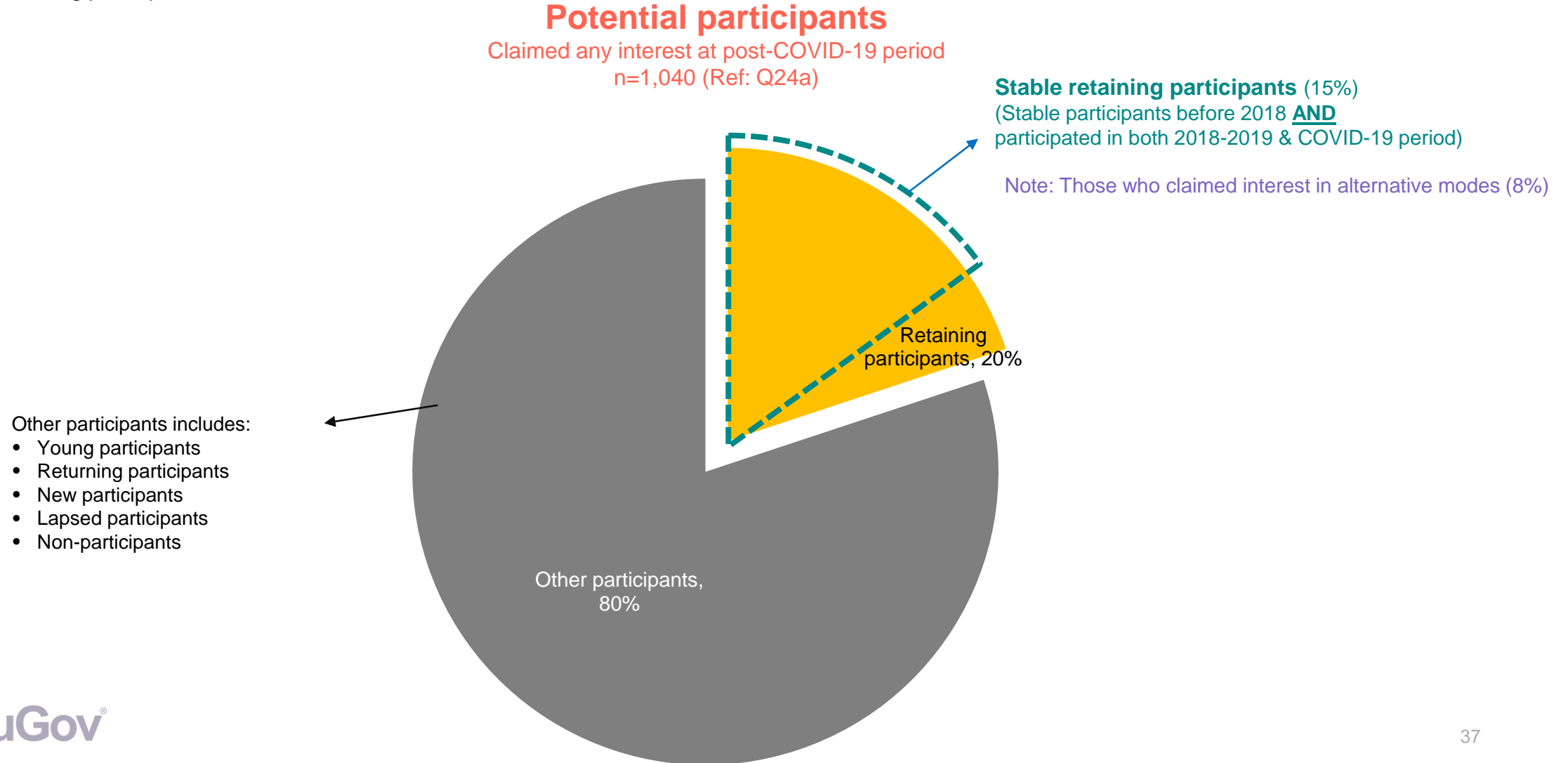


Note: For information source, respondents without awareness of or prior experience in alternative programmes are excluded, so the base does not cover all potential alternative-mode participants.

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

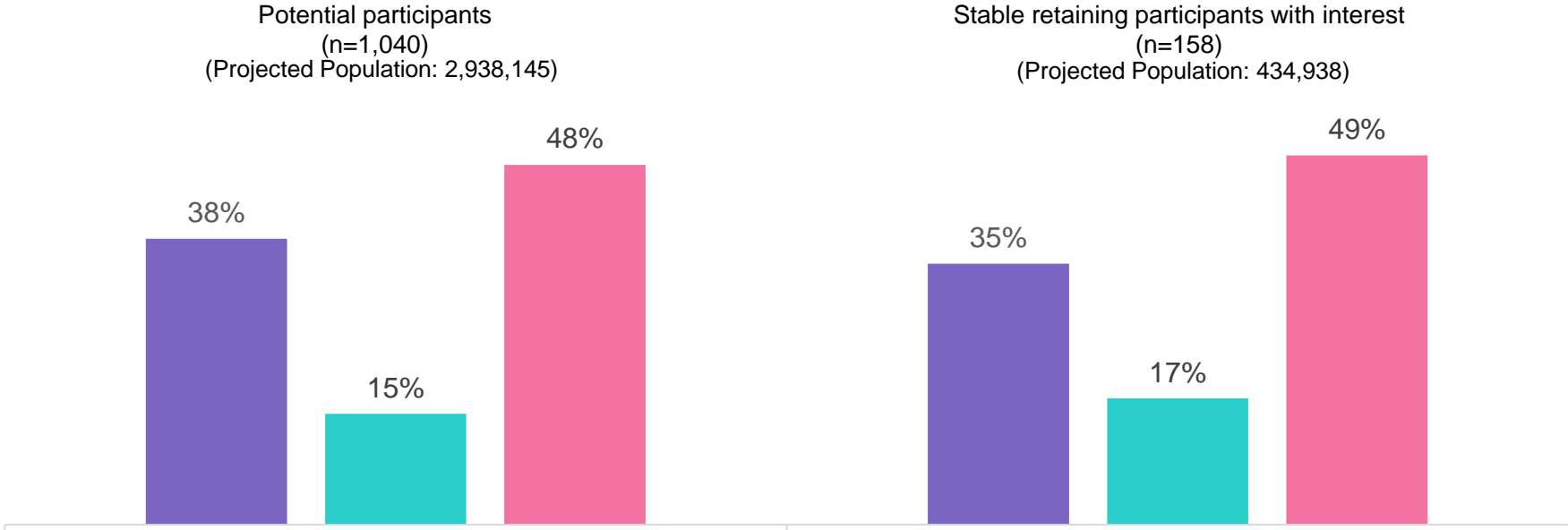
# Proportion of stable retaining participation with interest among potential participants – Music

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



# Stable retaining participants with participation interest at post-COVID-19 period – Music

- Stable retaining participants with future participation interest expressed similar levels of interest as all potential participants towards different modes.



	Alternative modes only	Both physical AND alternative modes	Physical modes only
<b>Any Alternative mode</b>	52%	51%	51%
<b>Any Physical mode</b>	62%	65%	65%
	Projected Population: 1,540,131	Projected Population: 1,827,908	Projected Population: 222,597
			Projected Population: 284,875

**YouGov** Q24a. 假如疫情後有藝術團體在同一節目提供現場參與及直播或限時播放兩種方式，對於不同藝術範疇您會考慮親身入場抑或以直播或自選播放方式觀賞或參與？如您會考慮透過直播或自選播放方式（包括電視或網上）觀賞或參與，請選A；如您會考慮親身入場觀賞或參與，請選B；如您完全不會考慮參與這類活動，請選C。如您同時會考慮透過直播/自選播放或親身入場兩種方式，請選A及B。(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 – Music

- Similar to all potential participants, stable retaining participants with interest were skewed towards 25-34 years old, married persons having children under 18 and those with higher household income.

	Total (n=1,500)	Potential participants (n=1,040)	Stable retaining participants with interest (n=158)
<b>Gender</b>			
Male	44%	43% ▼	52%
Female	56%	57% ▲	48%
<b>Age Group</b>			
16-24	13%	13%	11%
25-34	20%	22% ▲	27% ▲
35-44	22%	23%	20%
45-54	22%	23%	25%
55-64	23%	19% ▼	17% ▼
<b>Occupation</b>			
Business owners/ Managers and professionals	14%	16% ▲	25% ▲
White-collar	27%	27%	27%
Blue-collar	34%	33%	31%
Housewives	7%	7%	4%
Students	9%	9%	7%
Retirees	3%	2% ▼	3%
Unemployed	5%	4% ▼	3%
<b>Life Segment</b>			
Students	9%	9%	7%
Working singles	22%	22%	18%
Married persons having no children aged <18	24%	20% ▼	16% ▼
Married persons having children aged <18	32%	36% ▲	49% ▲
<b>Education Level</b>			
Secondary or below	45%	40% ▼	37% ▼
Post-secondary / University	55%	60% ▲	63% ▲
<b>Monthly Household Income</b>			
Below HKD 30,000	64%	60% ▼	48% ▼
HKD 30,000 - 49,999	24%	27% ▲	32% ▲
More than HKD 50,000	12%	14% ▲	20% ▲

	Total (n=1,500)	Potential participants (n=1,040)	Stable retaining participants with interest (n=158)
<b>Region &amp; living district</b>			
Hong Kong Island	17%	17%	17%
Central & Western	3%	3%	4%
Eastern	8%	8%	7%
Southern	4%	4%	4%
Wan Chai	2%	2%	2%
Kowloon	30%	31%	35%
Kowloon City	6%	6%	6%
Kwun Tong	8%	9%	12%
Sham Shui Po	6%	6%	8%
Wong Tai Sin	6%	5%	4%
Yau Tsim Mong	4%	5%	6%
New Territories	53%	52%	47%
Kwai Tsing	7%	6%	7%
North	5%	5%	7%
Sai Kung	7%	7%	8%
Sha Tin	8%	9%	7%
Tai Po	4%	4%	3%
Tsuen Wan	4%	4%	4%
Tuen Mun	8%	6% ▼	10%
Yuen Long	8%	8%	1% ▼
Islands	3%	3%	1%

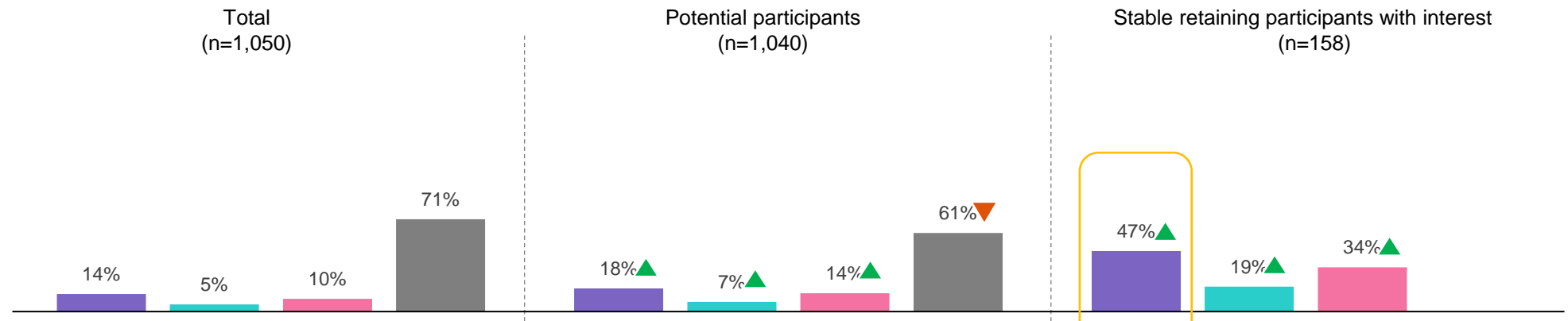
▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

# Profiles of stable retaining participants with participation interest at post-COVID-19 period – Music

- Even before COVID-19, nearly half of stable retaining participants with interest had already participated in alternative modes only, and the percentage of those who participated in alternative modes only climbed to 77% during COVID-19.

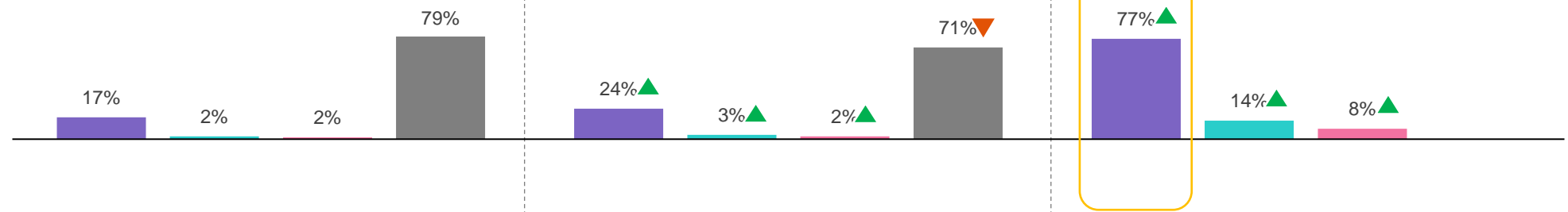
Mode of participation in 2018 – 2019

- 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

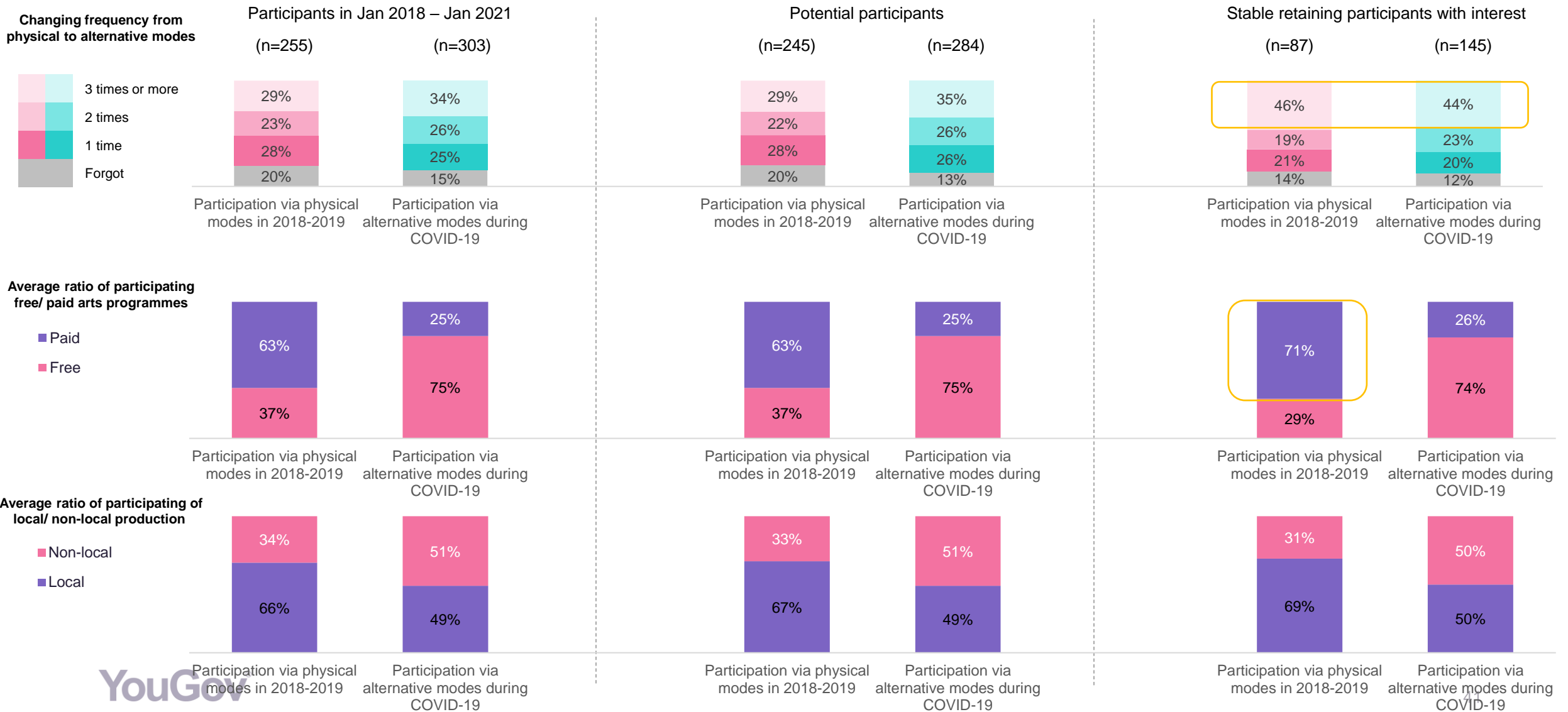


▲▼ Denote the figure of the segment is significantly higher/ lower than the total



# Profiles of stable retaining participants with participation interests at post-COVID-19 period – Music

- Stable retaining participants with interest had been frequent participants in either physical or alternative modes. They also participated in more paid physical Music programmes in 2018-2019 than 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 – Music

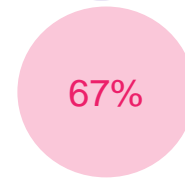
- Even for those stable retaining participants with interest in alternative modes, they would in general be likely to consider alternative modes only when physical participation was not possible.

Potential alternative-mode participants (n=296)

**Acceptable price level (Median)**

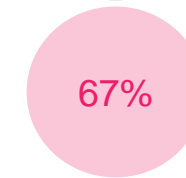
Excluding Free and Not sure

Note: Assuming ticket price HKD300 for in-person admission



**% of physical ticket**

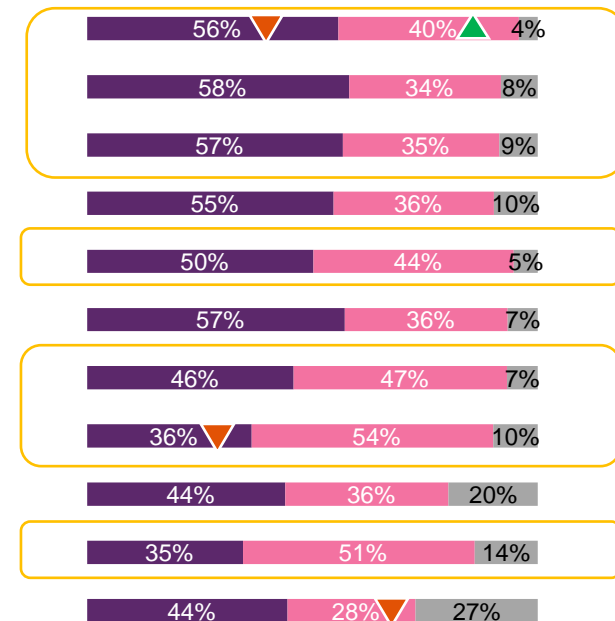
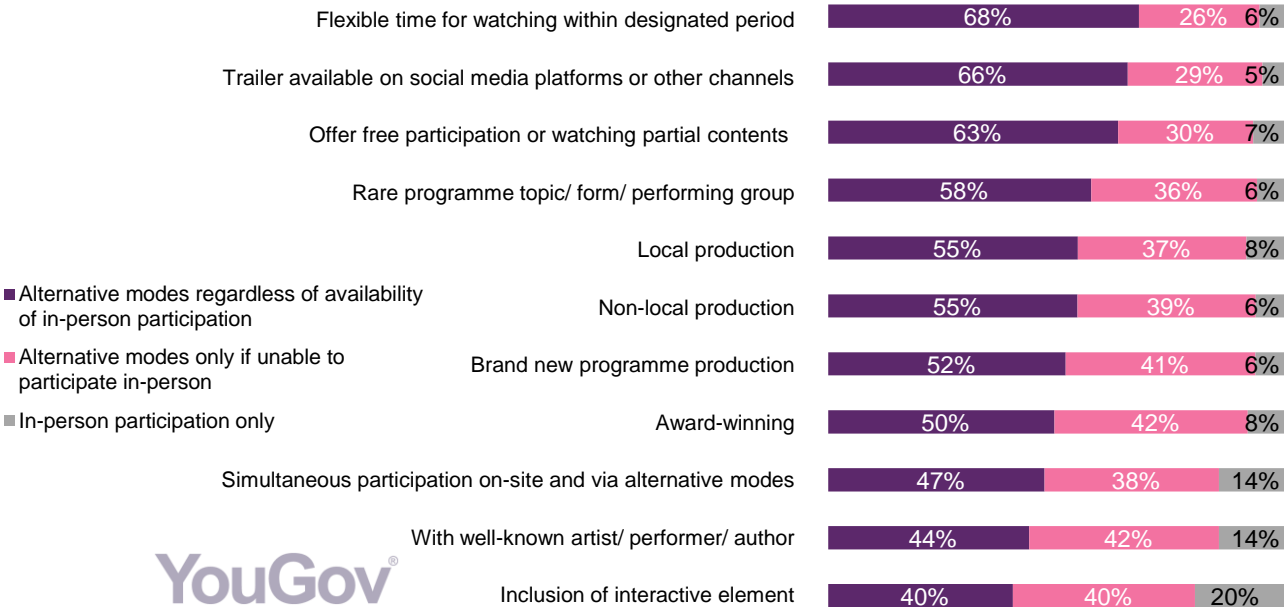
Stable retaining participants with interest in alternative modes (n=62)



**Important elements driving alternative modes**

Potential alternative-mode participants (n=530)

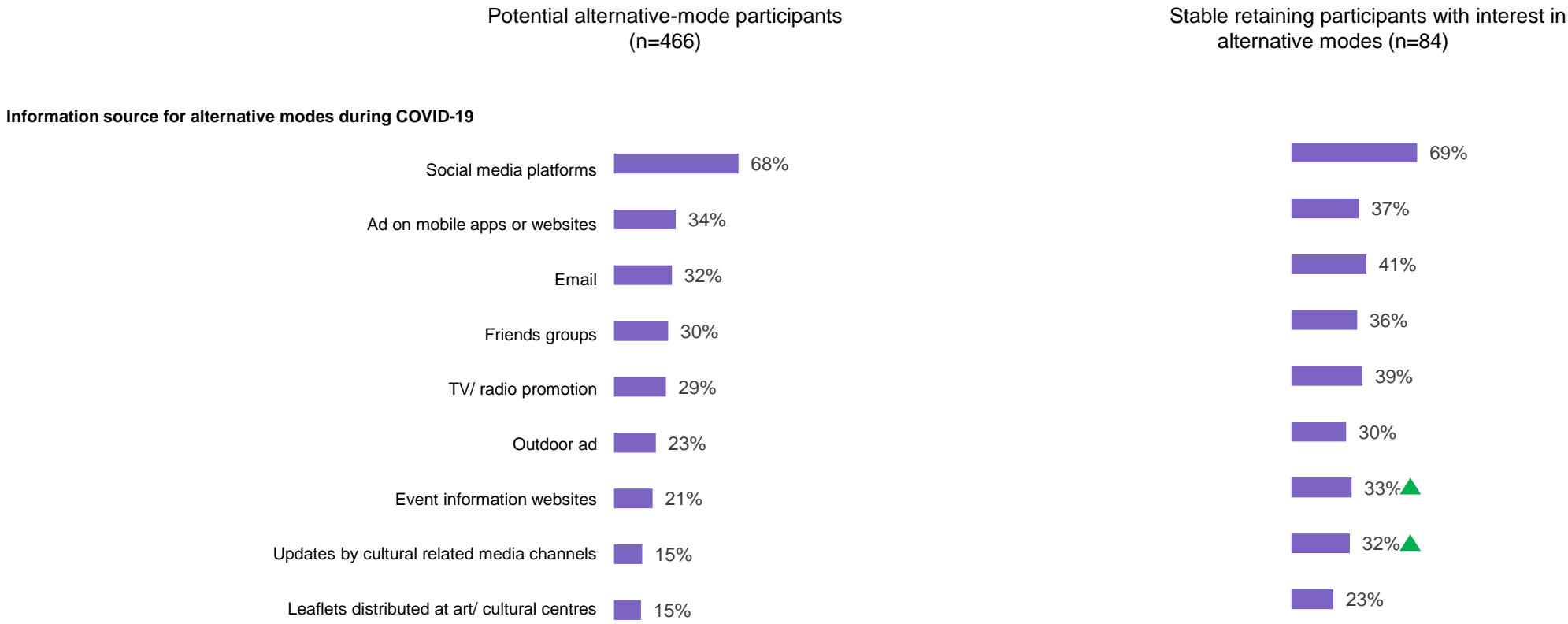
Stable retaining participants with interest in alternative modes (n=84)



▲ ▼ 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 – Music

- On top of social media platforms and emails, a significant higher proportion of stable retaining participants with interest in alternative modes also received programme information from event information websites and updates by culture-related media channels.



**YouGov** 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 – Music

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

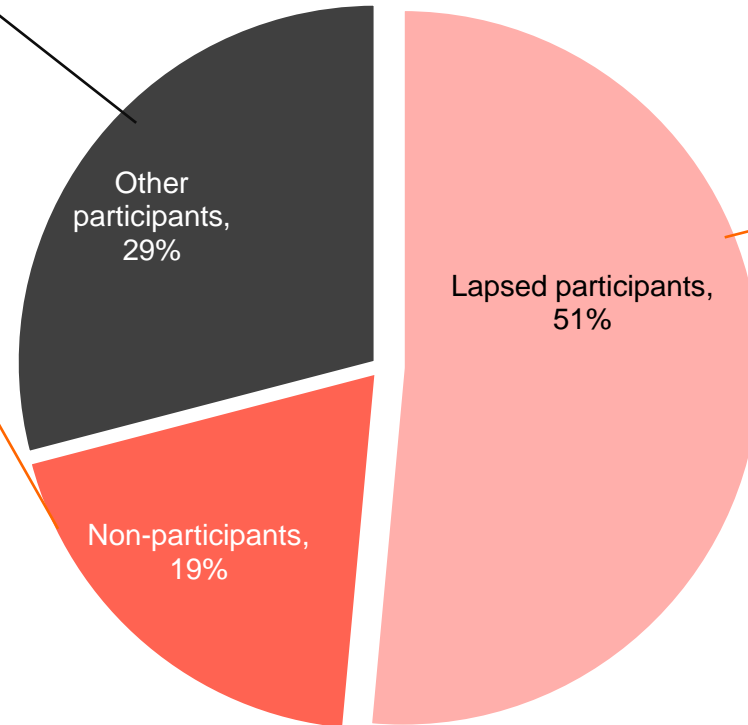
Amongst potential participants, a portion of them are lapsed participants or non-participants. The following slides will look into the reasons for not participating in 2018-2019 or during COVID-19 for these subgroups.

**Potential participants**  
 Claimed any interest at post-COVID-19 period  
 n= 1,040 (Ref: Q24a)

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

- Those who claimed interest in
- Physical modes (10%)
  - Alternative modes (11%)

- Those who claimed interest in
- Physical modes (35%)
  - Alternative modes (25%)



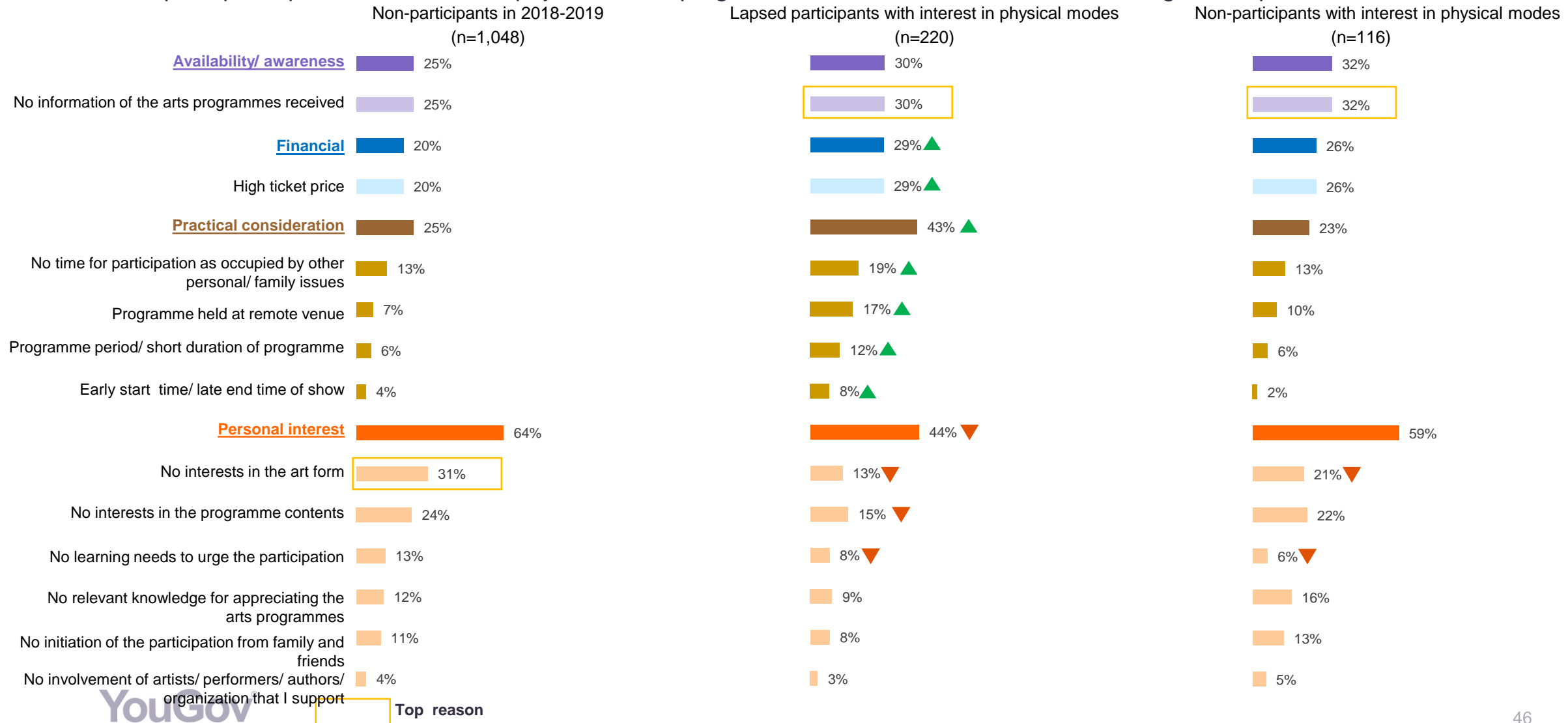
Other observations:

	Potential physical-mode participants	Non-participants with interest in physical modes
Aged 16-24	15%	23%
Working Singles	22%	31%
Married persons having children aged <18	36%	18%
MHI below HKD 30,000	59%	71%
MHI more than HKD 50,000	15%	8%

	Potential alternative-mode participants	Non-participants with interest in alternative modes
Female	57%	66%
Married persons having no children aged <18	18%	27%
Married persons having children aged <18	35%	24%
Secondary education or below	42%	52%
MHI below HKD 30,000	62%	70%
MHI more than HKD 50,000	13%	7%

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

- Lack of programme information was the main barrier for lapsed participants and non-participants in 2018-2019 despite their interest in Music.
- 29% of lapsed participants with interest in physical Music programmes were also concerned with the high ticket price.



Top reason

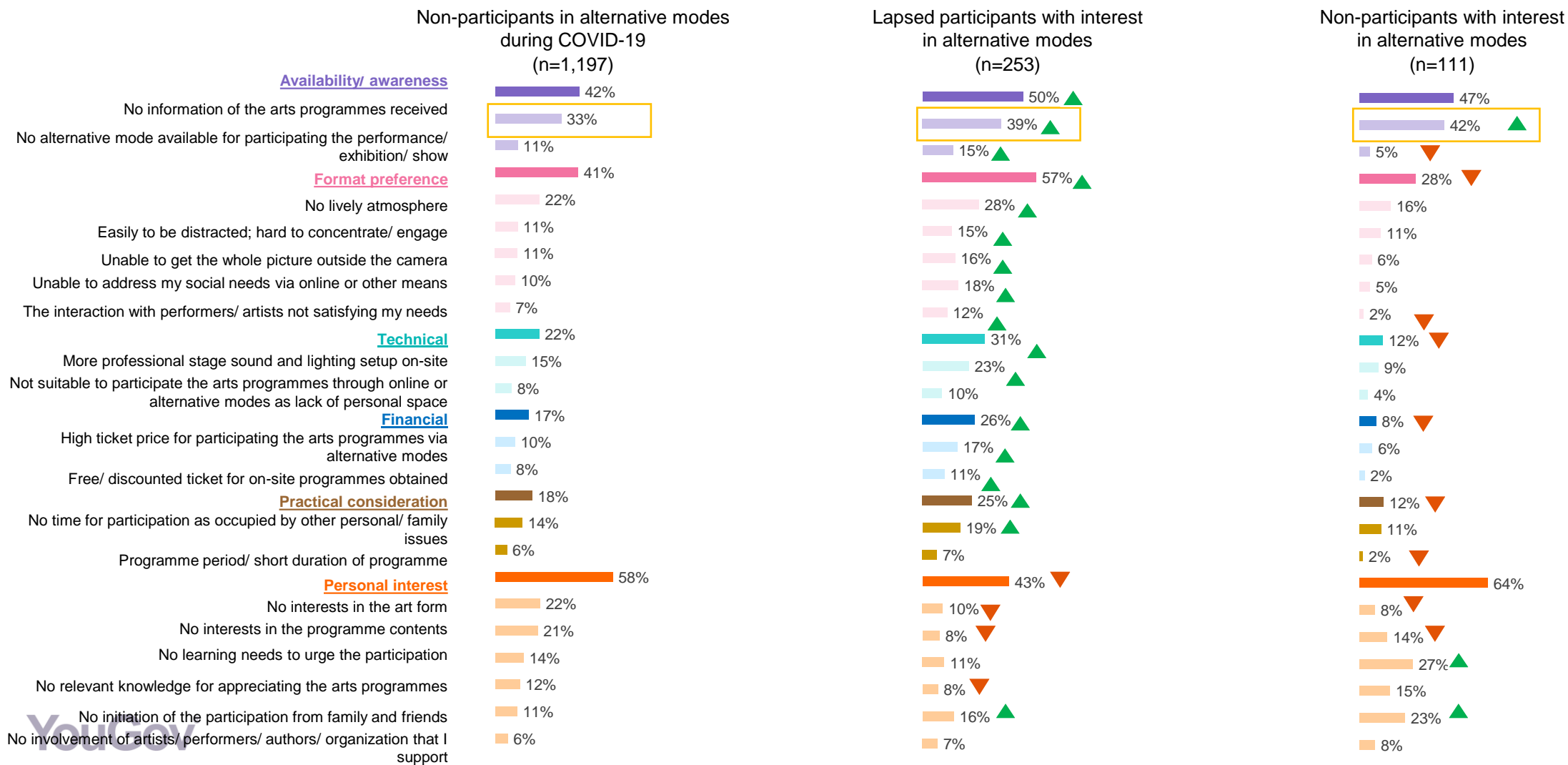
Note: Lapsed participants who have participated in 2018-2019 are excluded from this question, so not all lapsed participants with interest are covered here.

Base: Non-participants of Music 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 – Music

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



Base: Non-participants of Music 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 – Music

- The elements driving lapsed and non-participants towards alternative-mode participation were largely similar to those for all potential alternative-mode participants, except that non-participants would in general be more likely to consider alternative modes even when physical attendance was available.

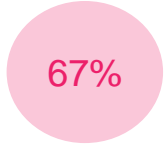
**Acceptable price level (Median)**  
Excluding Free and Not sure

Note: Assuming ticket price HKD300 for in-person admission

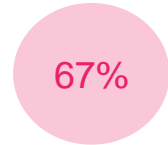
% of physical ticket

**Important elements driving alternative modes**

Potential alternative-mode participants  
(n=296)



Lapsed participants with interest in alternative modes  
(n=134)



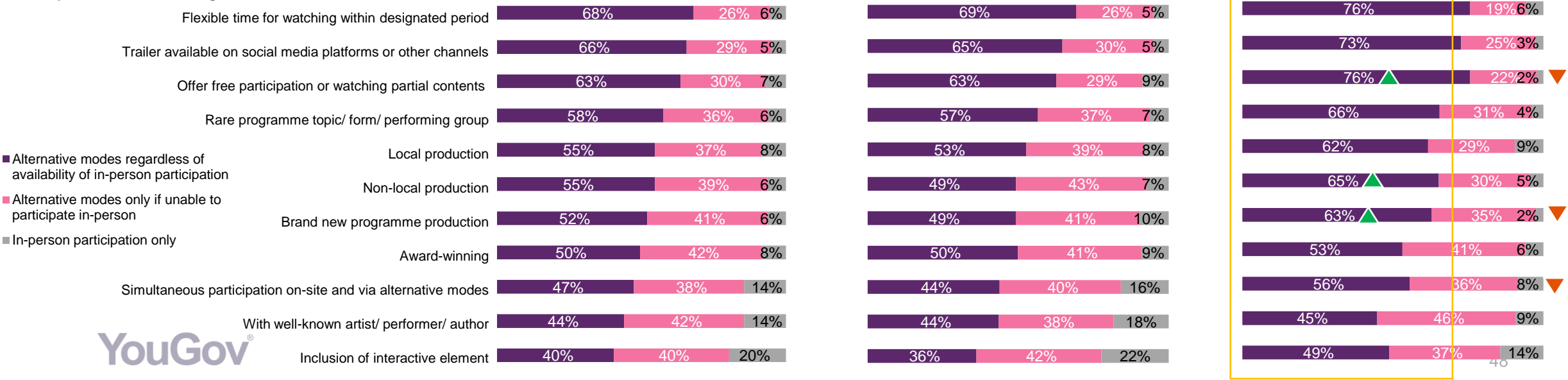
Non-participants with interest in alternative modes  
(n=45\*)



Potential alternative-mode participants  
(n=530)

Lapsed participants with interest in alternative modes  
(n=253)

Non-participants with interest in alternative modes  
(n=111)



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