

Individual Art Form Analysis – Visual Arts

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Key highlights

- Participation incidence in Visual Arts exhibitions dropped mildly from 14% in 2018-2019 to 11% during COVID-19. Young adults aged 25-34 and married persons having children under 18 were comparatively more active in Visual Arts participation.
- Half of the “lapsed participants since COVID-19” had only participated in Visual Arts exhibitions physically in 2018-2019. The lower availability of physical exhibitions during COVID-19 might be a reason why they ceased participation.
- The COVID-19 outbreak did not only make more Visual Arts participants to switch to alternative-mode participation, but these alternative-mode participants also enjoyed more free and non-local exhibitions than their physical-mode counterparts did before the epidemic. The participation frequency in alternative modes during COVID-19 was however slightly lower than that in physical modes in 2018-2019.
- Claimed interest (59%) in future Visual Arts exhibitions tripled the actual participation incidence in past 3 years (Jan 2018 – Jan 2021). The surge was mainly driven by interest growth in physical exhibitions (from 10% to 40%), whereas the interest growth in alternative modes was milder but still significant (from 14% to 25%).
- Actual participants in past 3 years and potential participants both were skewed towards young adults aged 25-34 and married persons having children under 18. They also tended to be better educated and have higher household income.
- Despite their higher interest in the art form, married persons having children under 18 were relatively more concerned with the incomprehensive experience offered by alternative modes. This might explain why over 40% of them suggested that they would only consider physical participation at post-COVID-19 period.
- Over 80% of potential Visual Arts participants were lapsed participants or non-participants. Among them, around 30-40% 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 exhibitions. Hence, more effort would be needed to disseminate information to potential participants through more effective channels such as social media platforms, and advertisements on mobile apps or websites .

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?

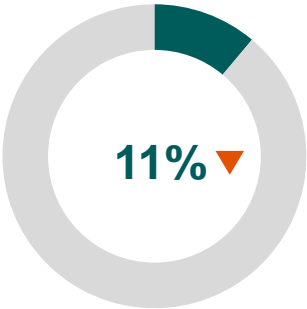
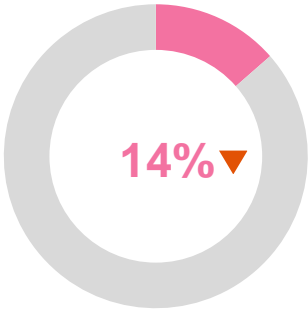
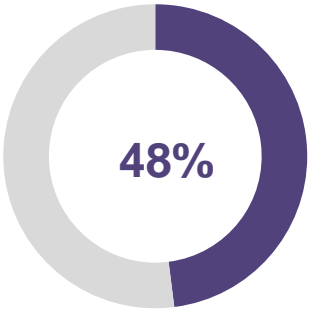
 Ever-Participation	Before 2018	In 2018-2019 (Before COVID-19)	During COVID-19 (Jan 2020 – Jan 2021)
• Retaining participants	✓	✓	✓
• Young participants		✓	✓
• Returning participants	✓		✓
• New participants			✓
• Lapsed participants since COVID-19	✓	✓	
		✓	
• Lapsed participants since 2018	✓		
• Non-participants			

Arts participation – Visual Arts

- Participation in Visual Arts exhibitions dropped from 14% before COVID-19 to 11% during COVID-19.
- Despite 8% of previous participants having lapsed since the epidemic, 4% resumed participation in the art form again.



Participation Incidence



Projected Population

2,093,321

588,211

481,287

Participation Segment

Projected Population

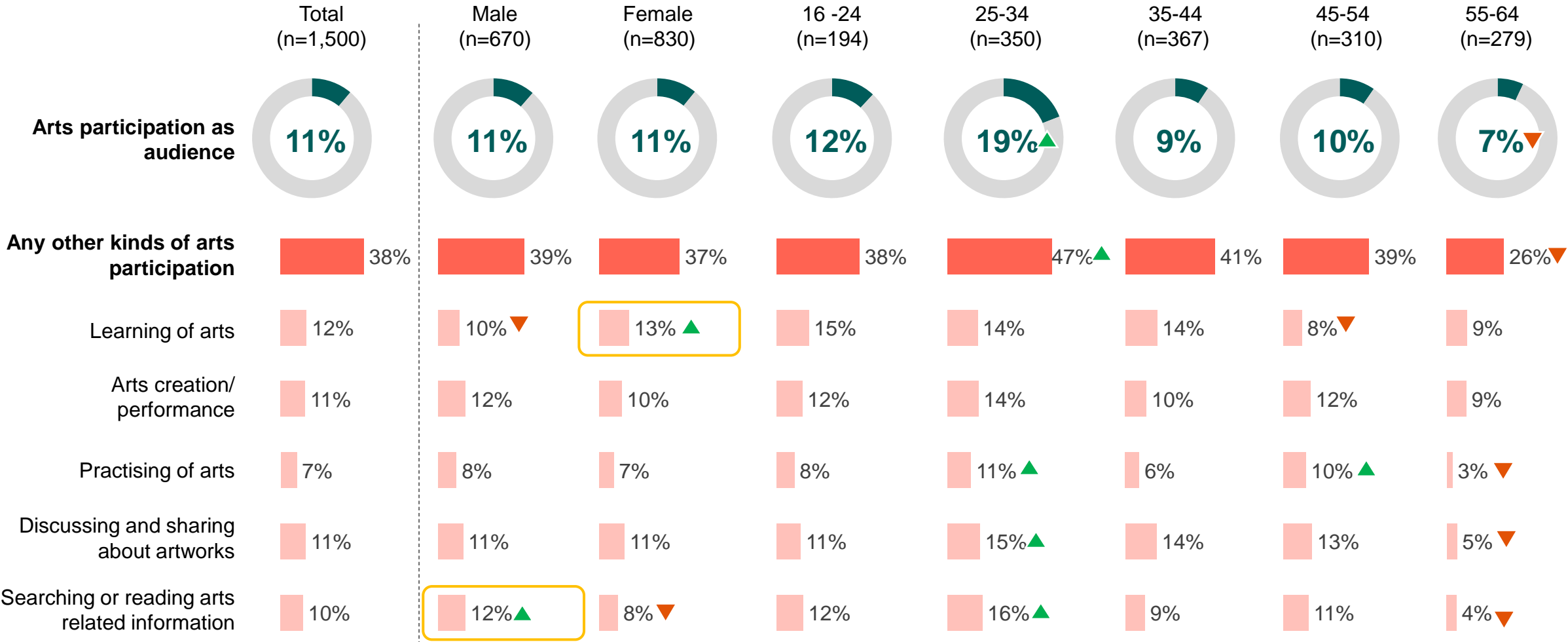
Participation Segment	Percentage	Projected Population
Total (n=1,500)		
Retaining participants	5%	214,735
Young participants	1%	43,114
Returning participants	4%	194,755
New participants	1%	28,683
Lapsed participants since COVID-19	8%	330,362
Lapsed participants since 2018	32%	1,392,784
Non-participants	49%	2,134,679



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 – Visual Arts – by demographics

- During COVID-19, people aged 25-34 were most active in participating in Visual Arts exhibitions - their participation incidence nearly doubled the overall rate. This age group was also the most active in other kinds of involvement in the art form.
- Women were more involved in learning Visual Arts (13%) while men tended to attain arts-related information (12%) during COVID-19.

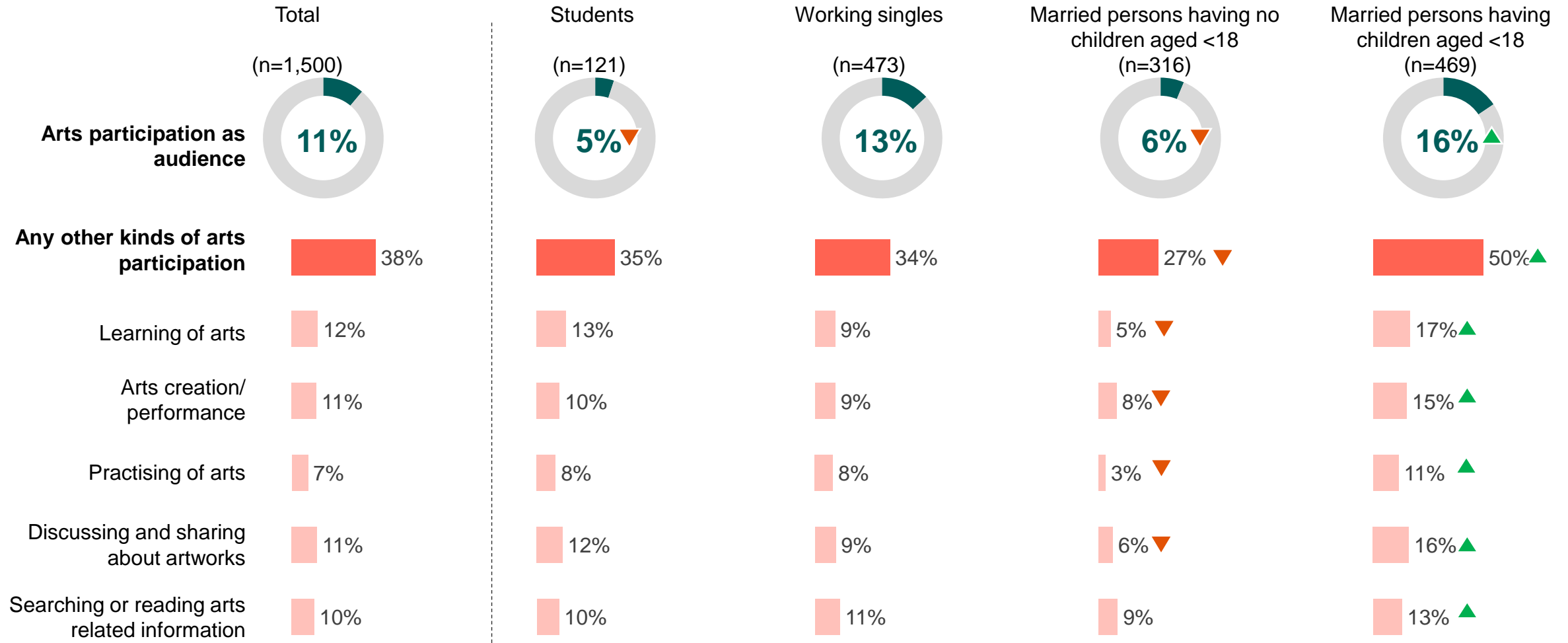


Base: All respondents, n=1,500
 ▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

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

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

- Married persons having children under 18 actively took part in Visual Arts exhibitions as well as in other kinds of arts engagement.
- While only 5% of students participated in Visual Arts exhibitions during COVID-19, 35% of them were still involved in the art form in other manners.



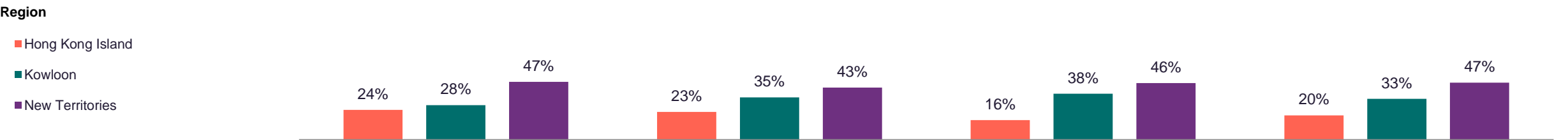
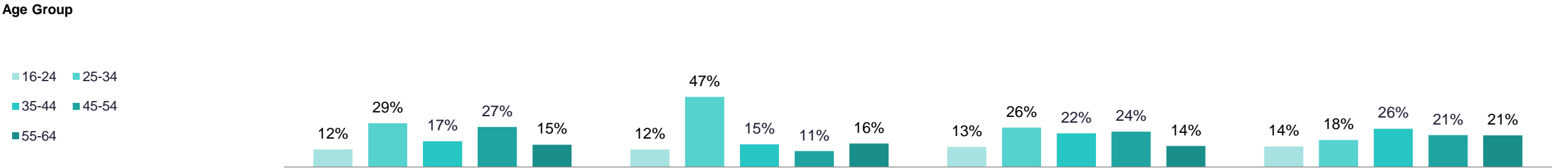
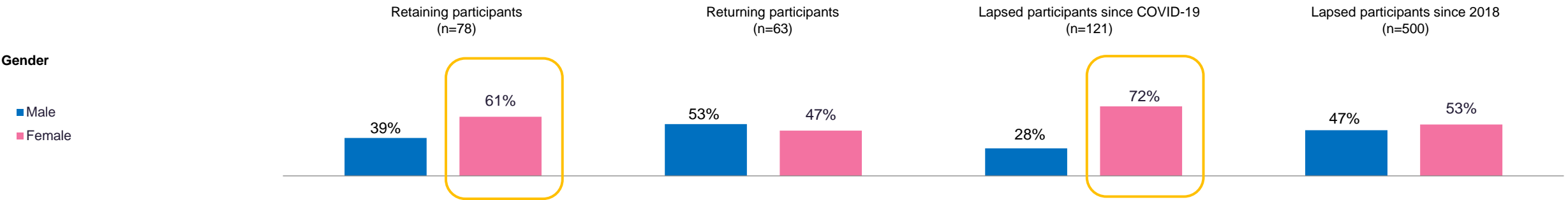
Base: All respondents, n=1,500

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

Profiles of arts participants – Visual Arts

Note to readers: The segments of Young participants (n=15) and New participants (n=10) are not shown due to small base

- While women comprised the majority of retaining participants, there was over 70% of lapsed participants since COVID-19 who were women.



Profiles of arts participants – Visual Arts

Note to readers: The segments of Young participants (n=15) and New participants (n=10) are not shown due to small base

- Retaining participants were comprised mainly of people with higher education attainment.

Retaining participants (n=78)

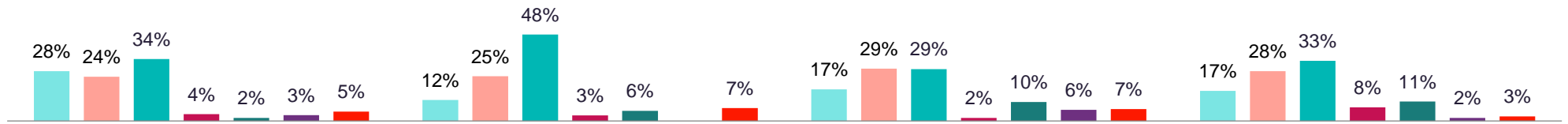
Returning participants (n=63)

Lapsed participants since COVID-19 (n=121)

Lapsed participants since 2018 (n=500)

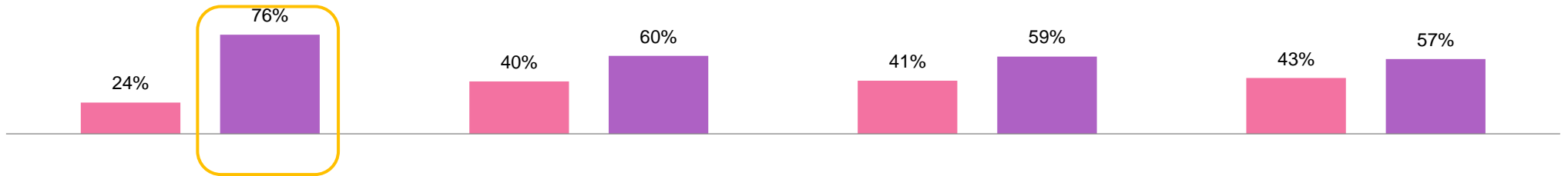
Occupation

- 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

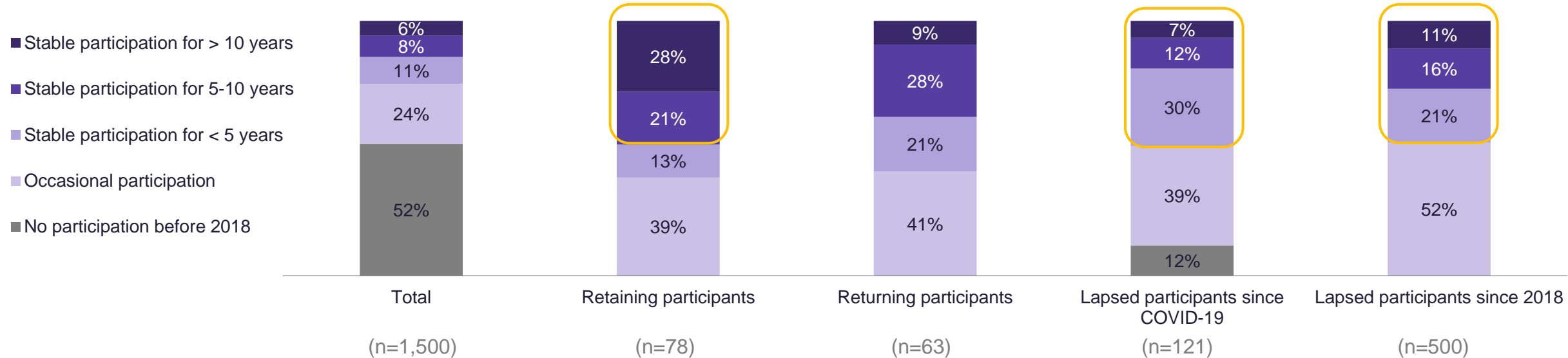


Arts participation before 2018 – Visual Arts

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

- Nearly half of retaining participants had stable participation in Visual Arts for over 5 years before 2018.
- Among lapsed participants since COVID-19 and since 2018, nearly half were also stable participants, but a considerable portion had participated only for less than 5 years before 2018.

Participation before 2018

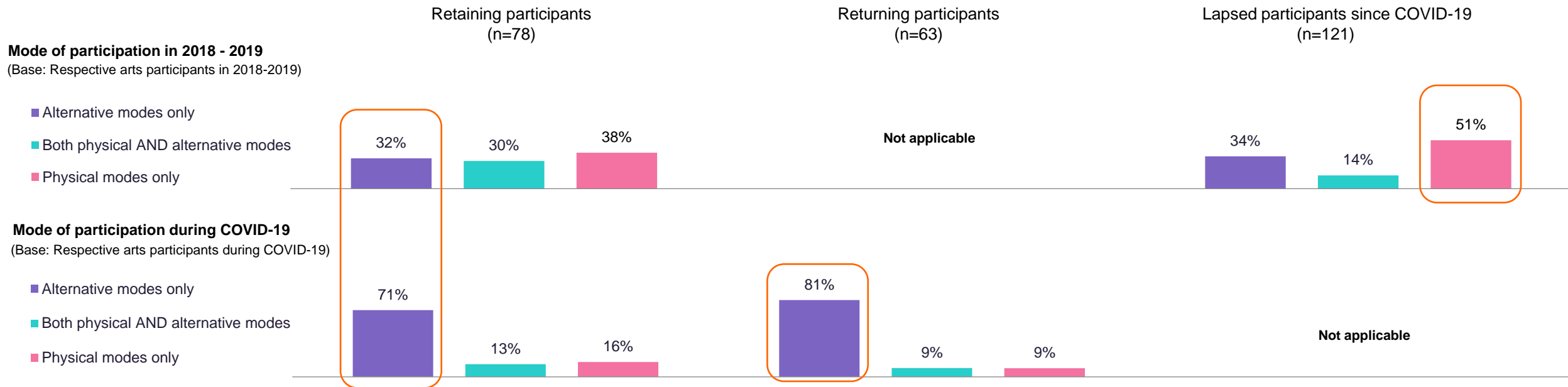


History of arts participation – Visual Arts

Note to readers: Lapsed participants since 2018 have no participation in either 2018-2019 or during COVID-19 and are therefore not shown. Also, the segments of Young participants (n=15) and New participants (n=10) are not shown due to small base.

- During COVID-19, retaining participants adapted to alternative-mode Visual Arts exhibitions quickly. Their participation incidence in alternative modes only (71%) more than doubled that in 2018-2019 (32%).
- Alternative-mode exhibitions attracted some returning participants during COVID-19, with 81% of them attending only in alternative modes.
- Half of the lapsed participants since COVID-19 had only participated in Visual Arts exhibitions physically in 2018-2019. The lower availability of physical exhibitions during COVID-19 might be a reason why they ceased participation.

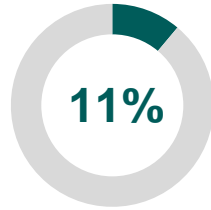
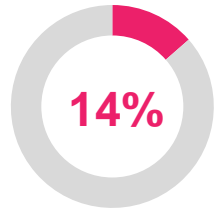
History of Arts Participation



Mode of participation among arts participants – Visual Arts

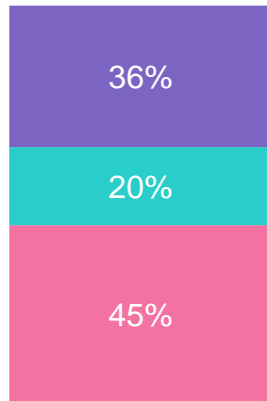
- Participation in alternative modes grew from 55% in 2018-2019 to 88% during COVID-19, while physical participation dropped significantly from 64% to 22%.
- The popularity growth was particularly prominent for social media platforms and designated official websites.

Participation Incidence (n=1,500)

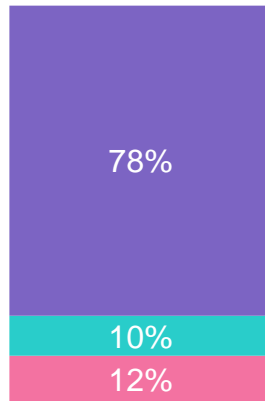


Mode of participation among participants

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



In 2018 – 2019
(n=214)



During COVID-19
(n=166)

Projected Population

Mode of Participation

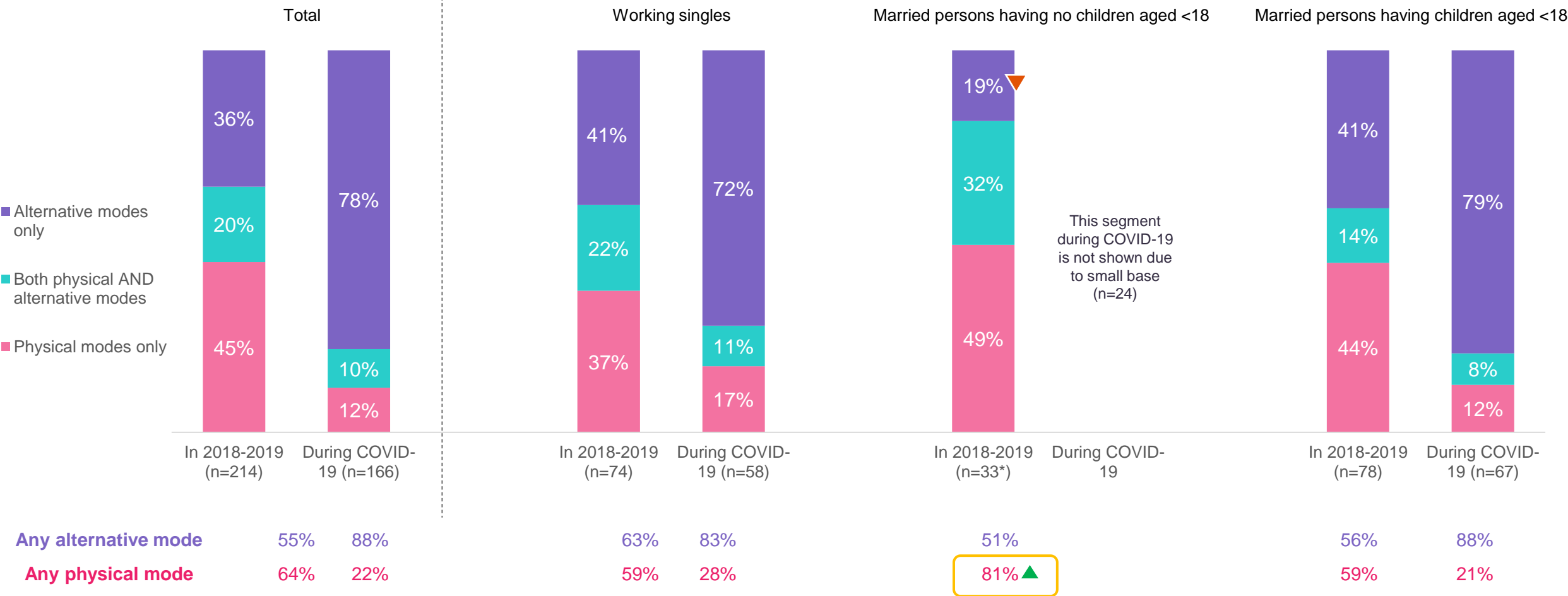
Mode of Participation	In 2018 – 2019 (n=214)	During COVID-19 (n=166)
Alternative modes only	210,067	376,536
Both physical AND alternative modes	115,818	48,493
Physical modes only	262,327	56,258

	In 2018 – 2019 (n=214)	During COVID-19 (n=166)
In-person admission	64%	22%
Any alternative modes	55%	88%
Social media platforms (e.g. Facebook, YouTube)	40%	63%
Designated official websites	24%	39%
Via other online channels	16%	19%

Mode of participation among arts participants – Visual Arts – by life segments

Note to readers: The segments of students (n=13 in 2018-2019, n=6 during COVID-19) and retirees (n=4 in 2018-2019, n=2 during COVID-19) are not shown due to small base

- The patterns in participation modes were similar across different life segments except for married persons having no young children, who were considerably more likely to take part in physical-mode programmes before COVID-19.



This segment during COVID-19 is not shown due to small base (n=24)

81% ▲



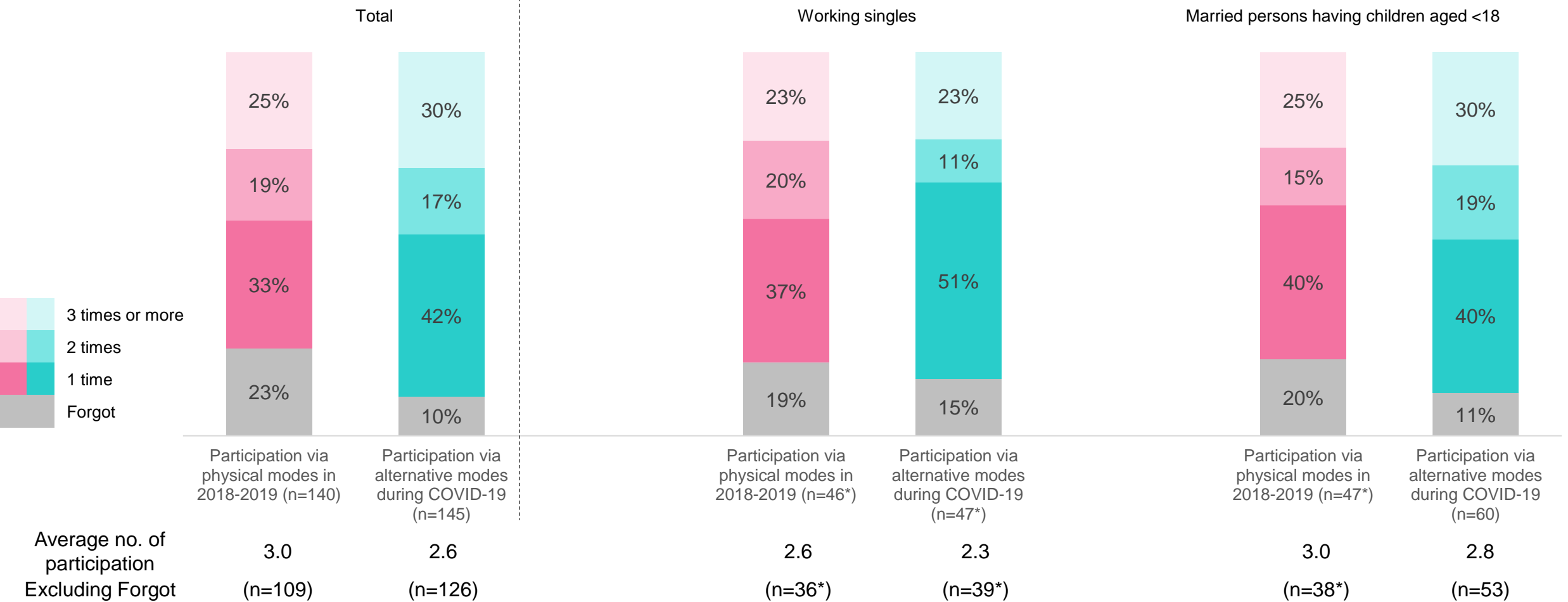
Base: Arts participants of respective art form in 2018-2019 and those during COVID-19

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

Changing frequency from physical to alternative modes – Visual Arts

Note to readers: The segments of students (n=13 in 2018-2019, n=5 during COVID-19), married persons having no children aged <18 (n=25 in 2018-2019, n=23 during COVID-19) and retirees (n=4 in 2018-2019, n=2 during COVID-19) are not shown due to small base

- Unlike in most other art forms where alternative-mode participation was often more frequent than physical-mode participation, alternative-mode Visual Arts participants during COVID-19 participated slightly less frequently than their physical-mode counterparts did in 2018-2019.



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.

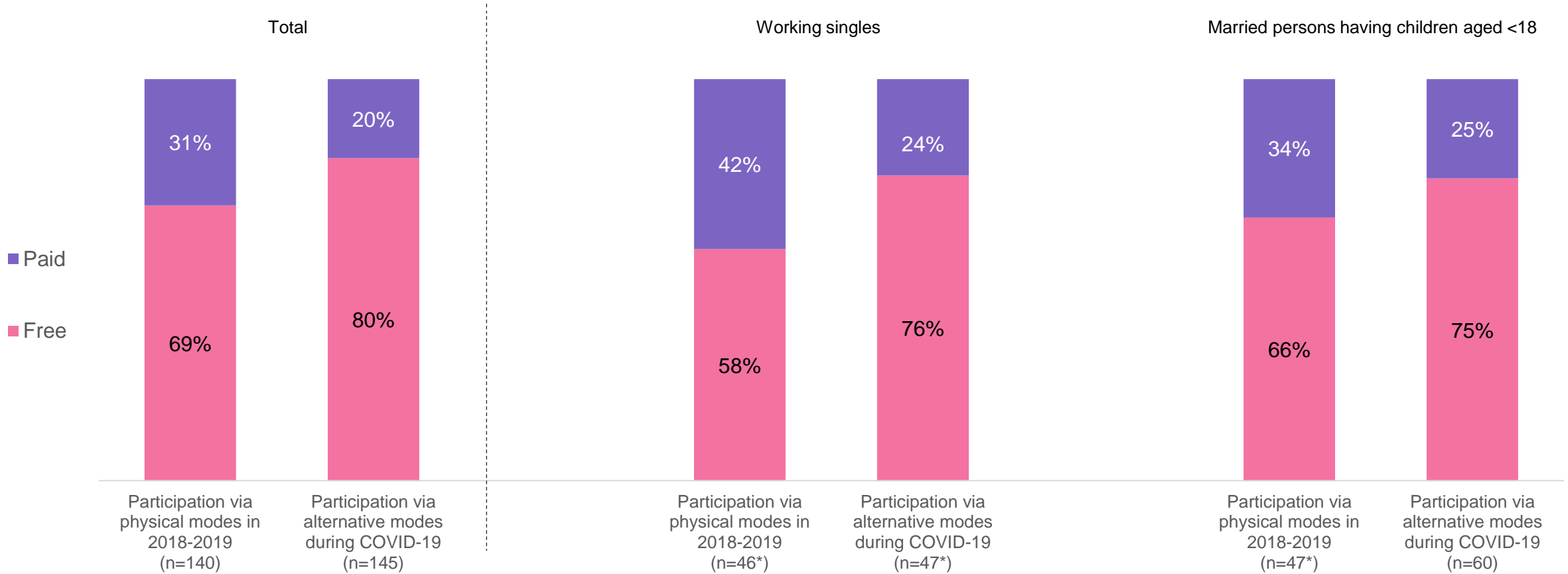
Base: Physical-mode participants of respective art form in 2018-2019, and alternative-mode participants of respective art form during COVID-19

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

Average ratio of participating free/ paid arts programmes – Visual Arts

Note to readers: The segments of students (n=13 in 2018-2019, n=5 during COVID-19), married persons having no children aged <18 (n=25 in 2018-2019, n=23 during COVID-19) and retirees (n=4 in 2018-2019, n=2 during COVID-19) are not shown due to small base

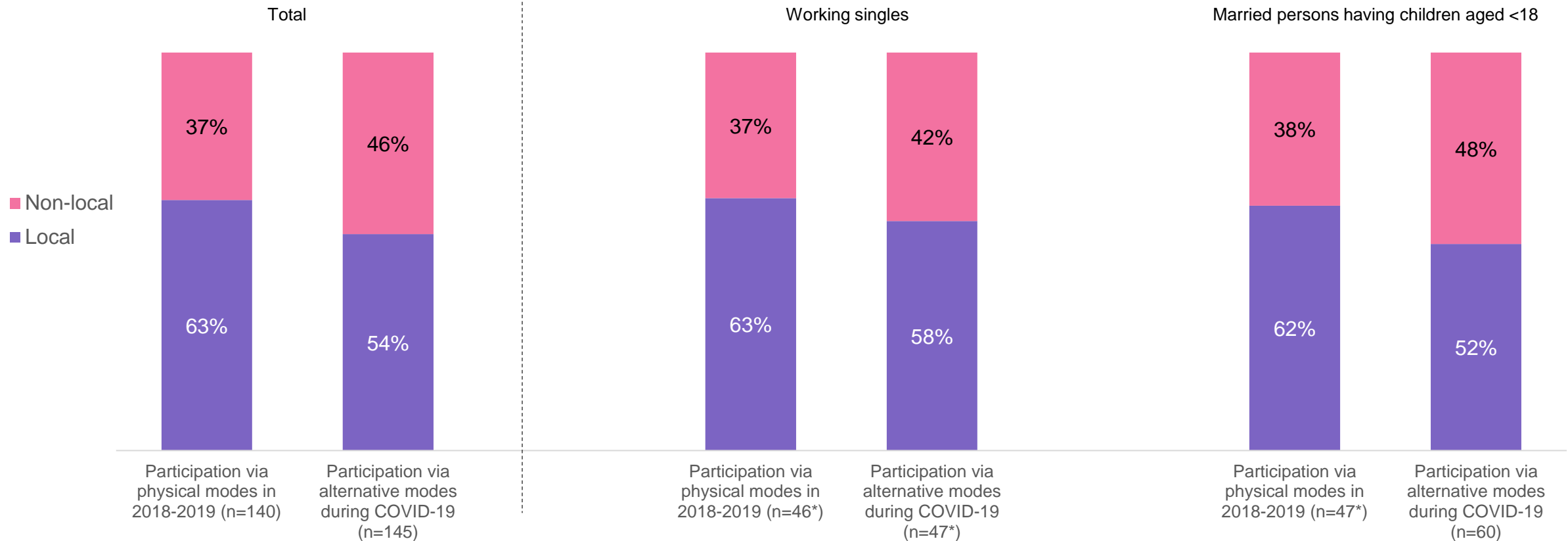
- Free Visual Arts exhibitions became even more popular among alternative-mode participants during COVID-19 than physical-mode participants before the epidemic.



Average ratio of participating arts programmes of local/ non-local production – Visual Arts

Note to readers: The segments of students (n=13 in 2018-2019, n=5 during COVID-19), married persons having no children aged <18 (n=25 in 2018-2019, n=23 during COVID-19) and retirees (n=4 in 2018-2019, n=2 during COVID-19) are not shown due to small base

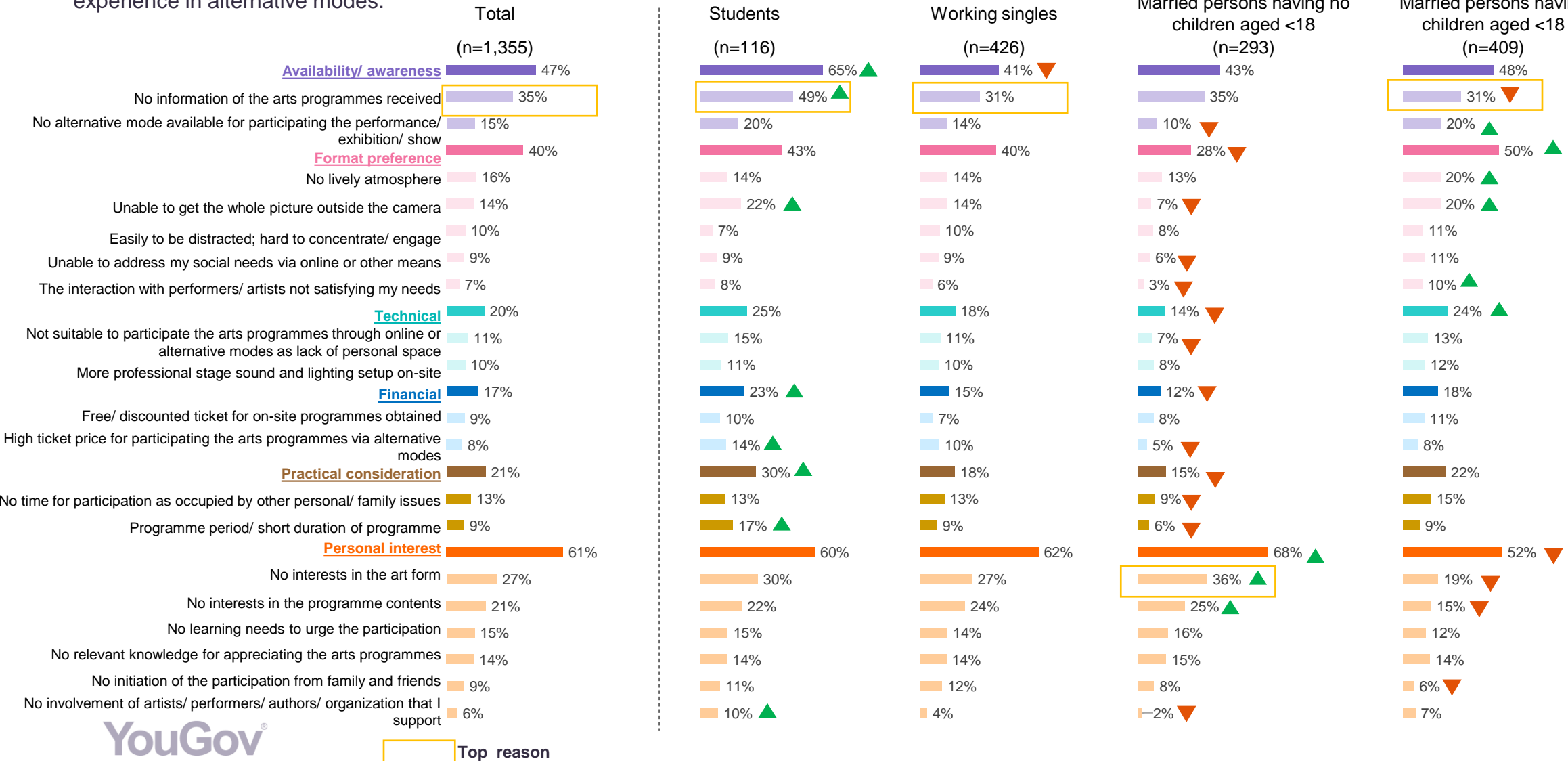
- In 2018 – 2019, 63% took part in physical-mode programmes that featured local artists.
- Alternative-mode programmes might get easier access to non-local artists, which lead to higher participation rate (46%) in non-local production during COVID-19.



Reasons for not participating via alternative modes during COVID-19 – Visual Arts

Note to readers: The segment of retirees is not shown due to small base (n=24)

- Lack of awareness (35%) and no interest in art form (27%) were the main barriers to alternative-mode participation in Visual Arts exhibitions during COVID-19.
- While married persons who had children under 18 were relatively more active Visual Arts participants, they were also the most concerned with the incomprehensive experience in alternative modes.



 Top reason

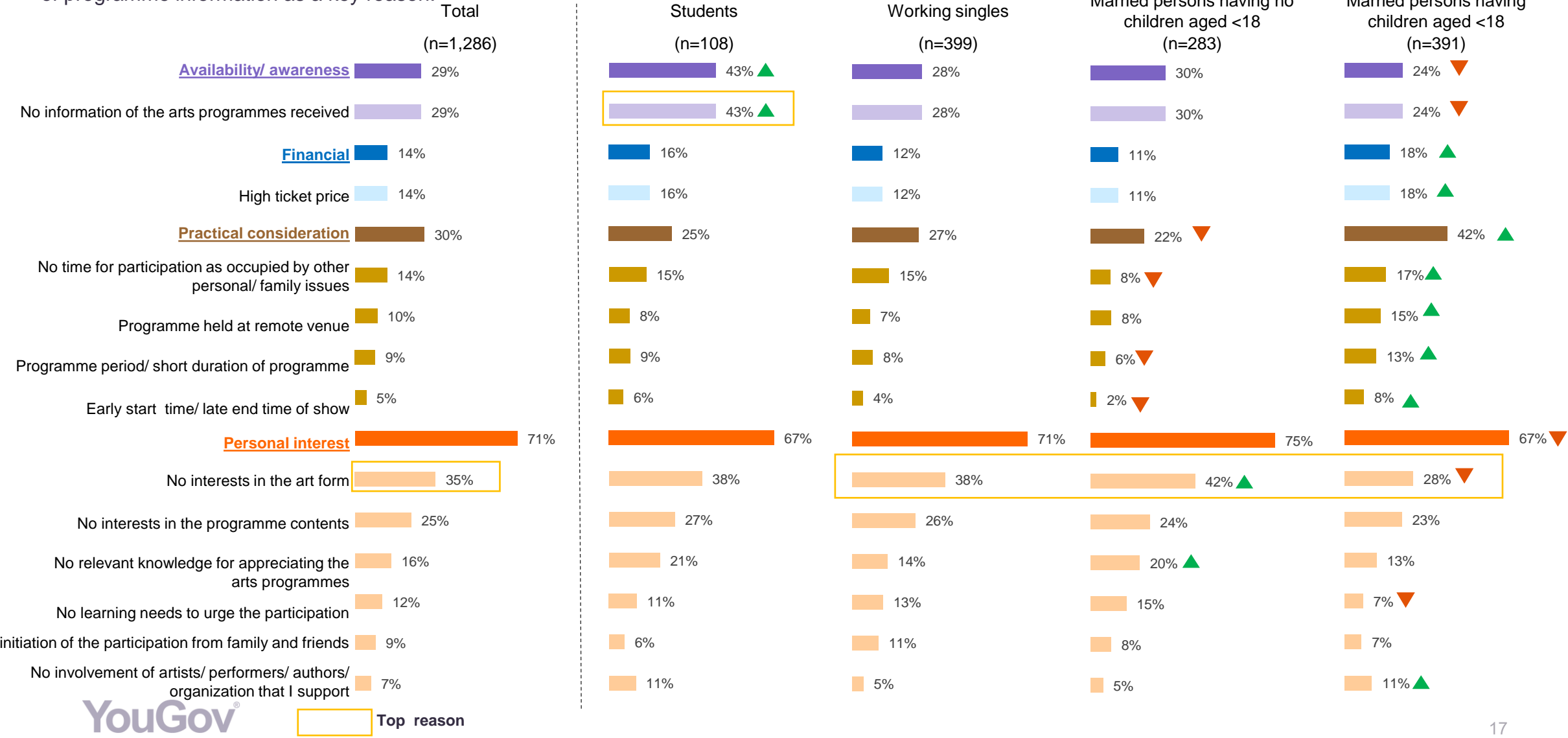
Base: Non-participants of Visual Arts programme via alternative modes during COVID-19

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

Reasons for not participating in 2018-2019 – Visual Arts

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

- In 2018-2019, no interest in the art form was the main reason for non-participation in Visual Arts exhibitions for all life segments except students, who cited the lack of programme information as a key reason.



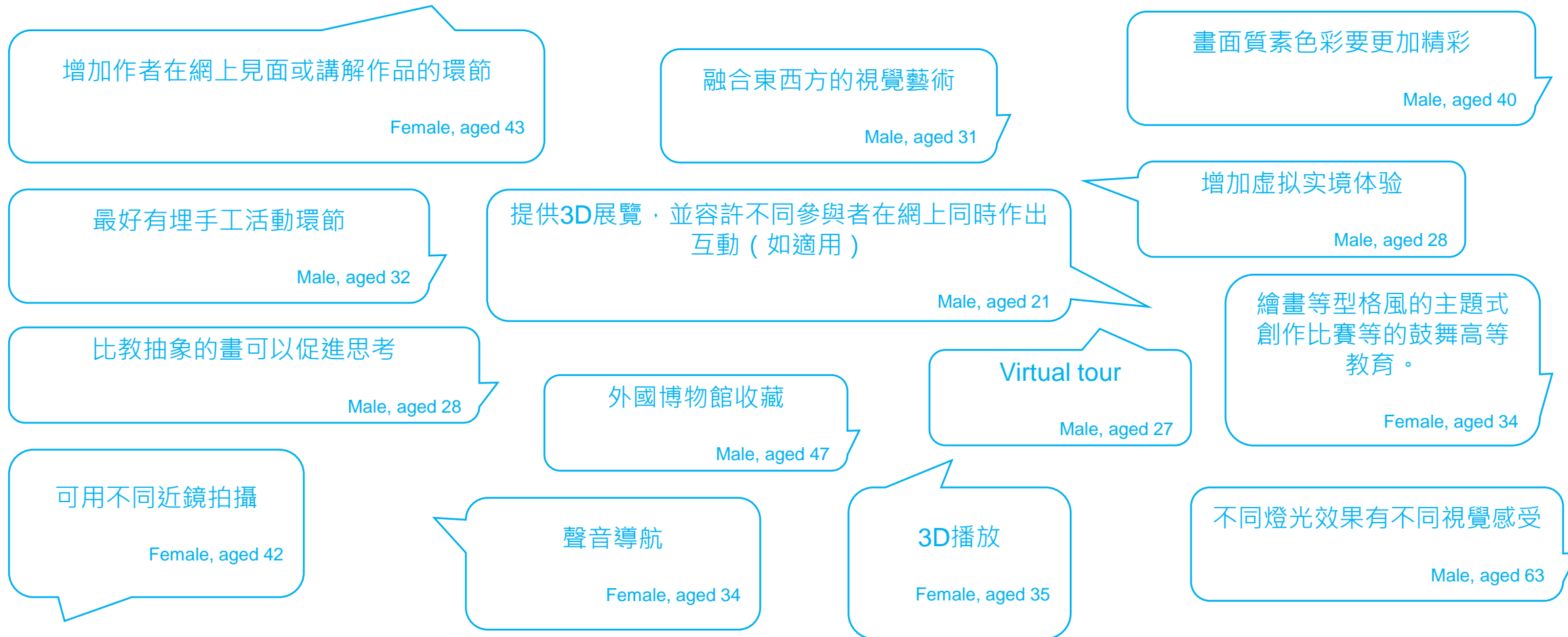
Top reason

Base: Non-participants of Visual Arts programme in 2018-2019

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

Voices of respondents in participating the arts activities in alternative modes

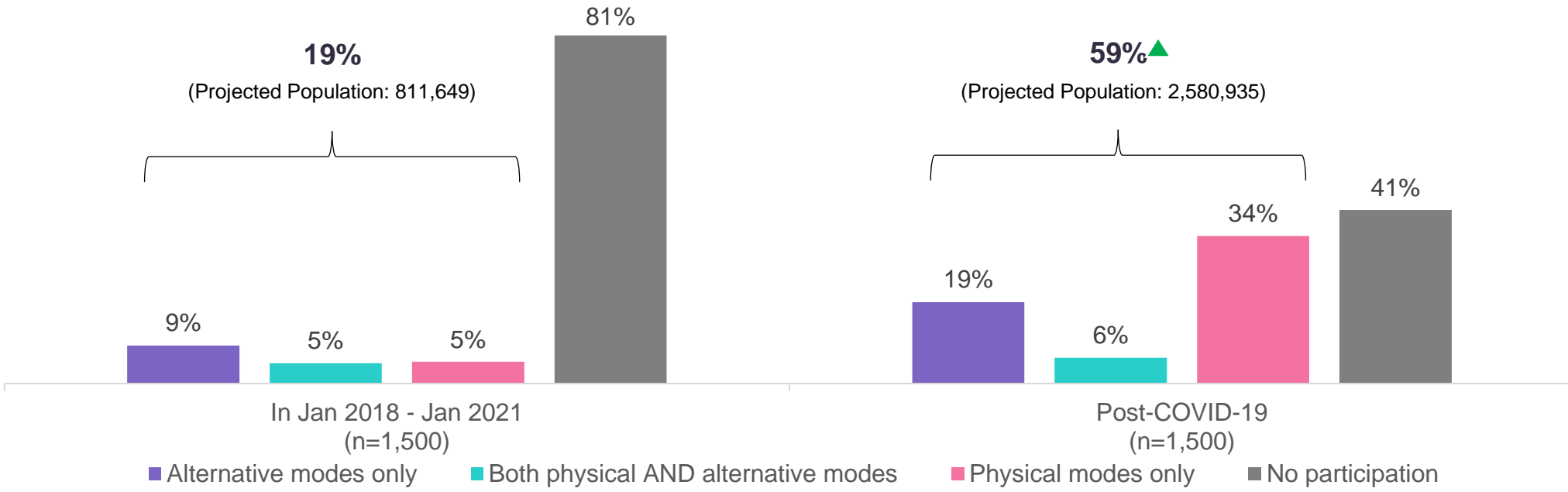
Visual Arts



Potential Participants of Visual Arts

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

- 59% of respondents expressed interest in Visual Arts exhibitions at post-COVID-19, triple the actual participation incidence (19%) in the art form in recent years.
- Claimed interest in physical participation was particularly strong at 40%, which was four times the actual incidence in recent years.
- Although alternative-mode participation was relatively less preferable, there was still a considerable interest growth from 14% to 25%.



	In Jan 2018 - Jan 2021	Projected Population	Post-COVID-19	Projected Population
Any alternative mode	14%	591,803	25%	1,086,573
Any physical mode	10%	426,556	40%	1,756,109



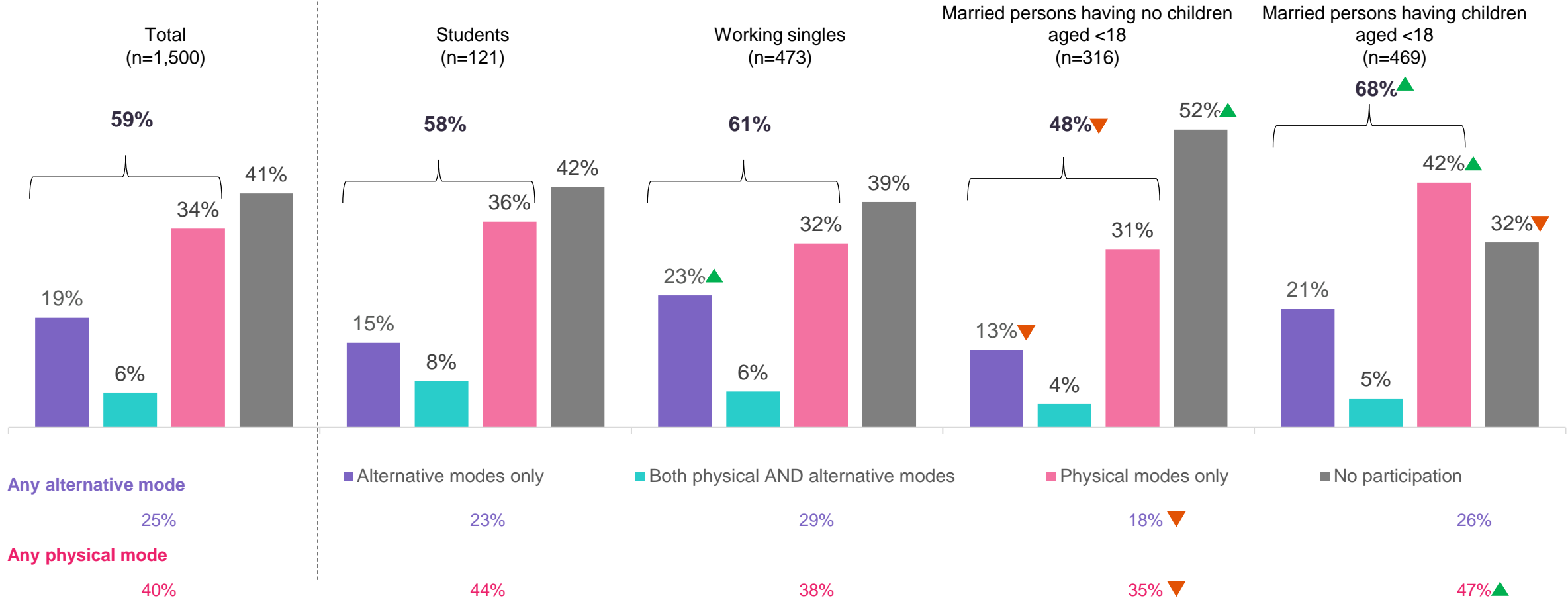
Base: All respondents, n=1,500

▲ ▼ 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 – Visual Arts – by life segments

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

- All life segments would prefer physical modes over alternative ones. In particular, over 40% of married persons having children under 18 would consider physical participation only.
- Working singles were relatively more agreeable to alternative-mode participation, with 23% suggesting they would participate only in alternative modes.

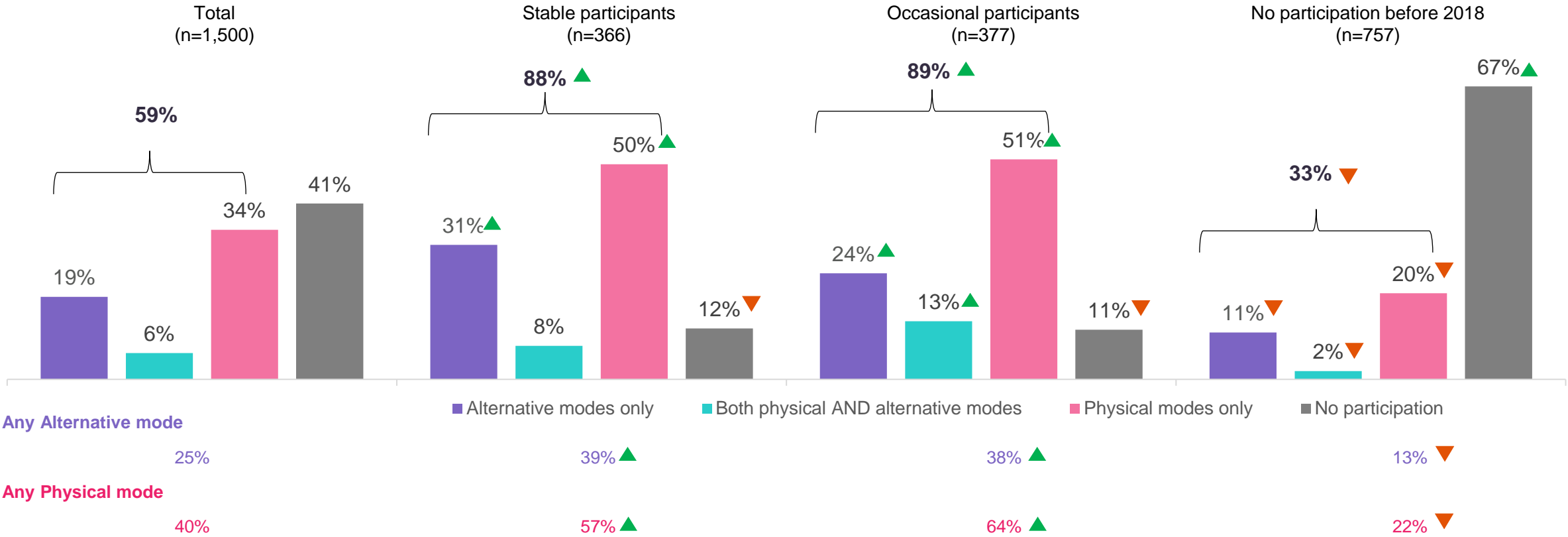


Base: All respondents, n=1,500

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

Claimed interest in arts participation at post-COVID-19 Period – Visual Arts – by participation frequency

- While both stable and occasional participants before 2018 were similarly likely to participate in future Visual Arts exhibitions, occasional participants shown slightly stronger preference towards physical participation.



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

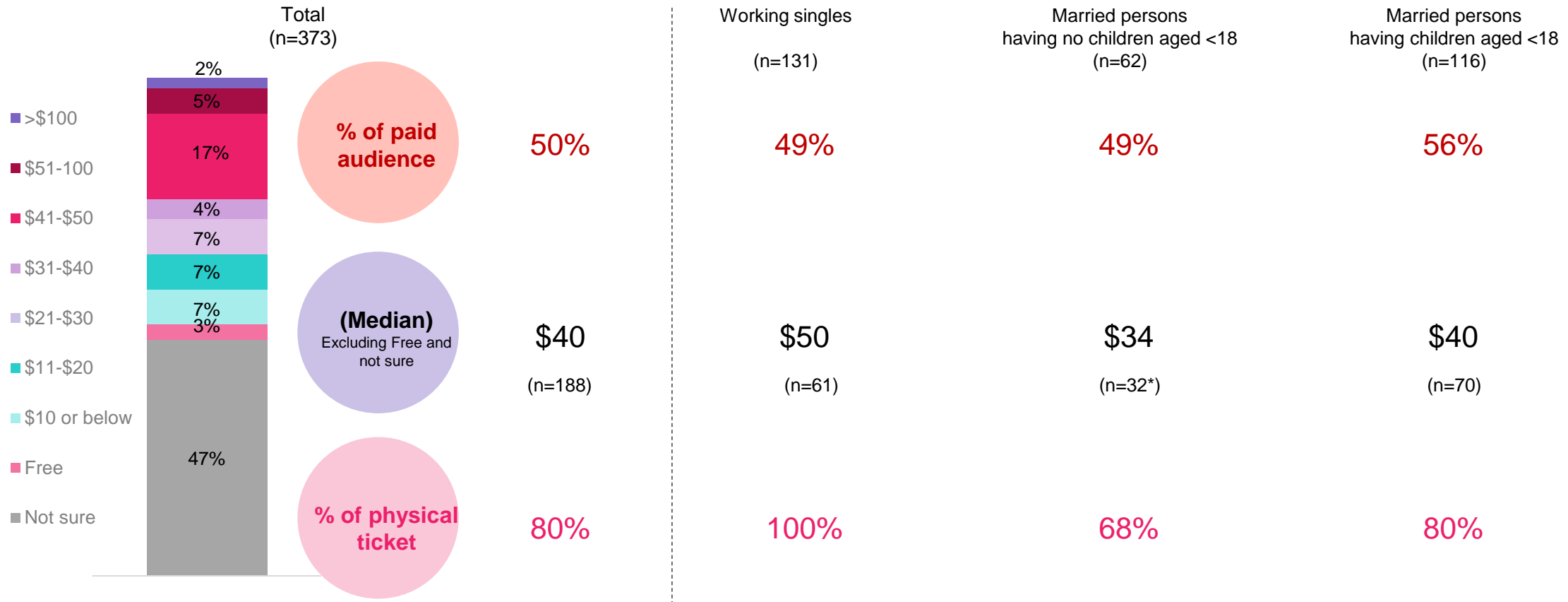
Base: All respondents, n=1,500

▲▼ 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 – Visual Arts – by life segments

Note to readers: The segments of students (n=28) and retirees (n=8) are not shown due to small base
 Assuming ticket price HKD50 for in-person admission

- Half of potential alternative-mode participants were willing to pay for alternative-mode exhibitions in the future, although they expected a 20% discount off the physical ticket price.
- Working singles would be more willing to pay the same ticket price as in physical participation, whereas married persons having no children under 18 would expect more discount for alternative-mode exhibitions.



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

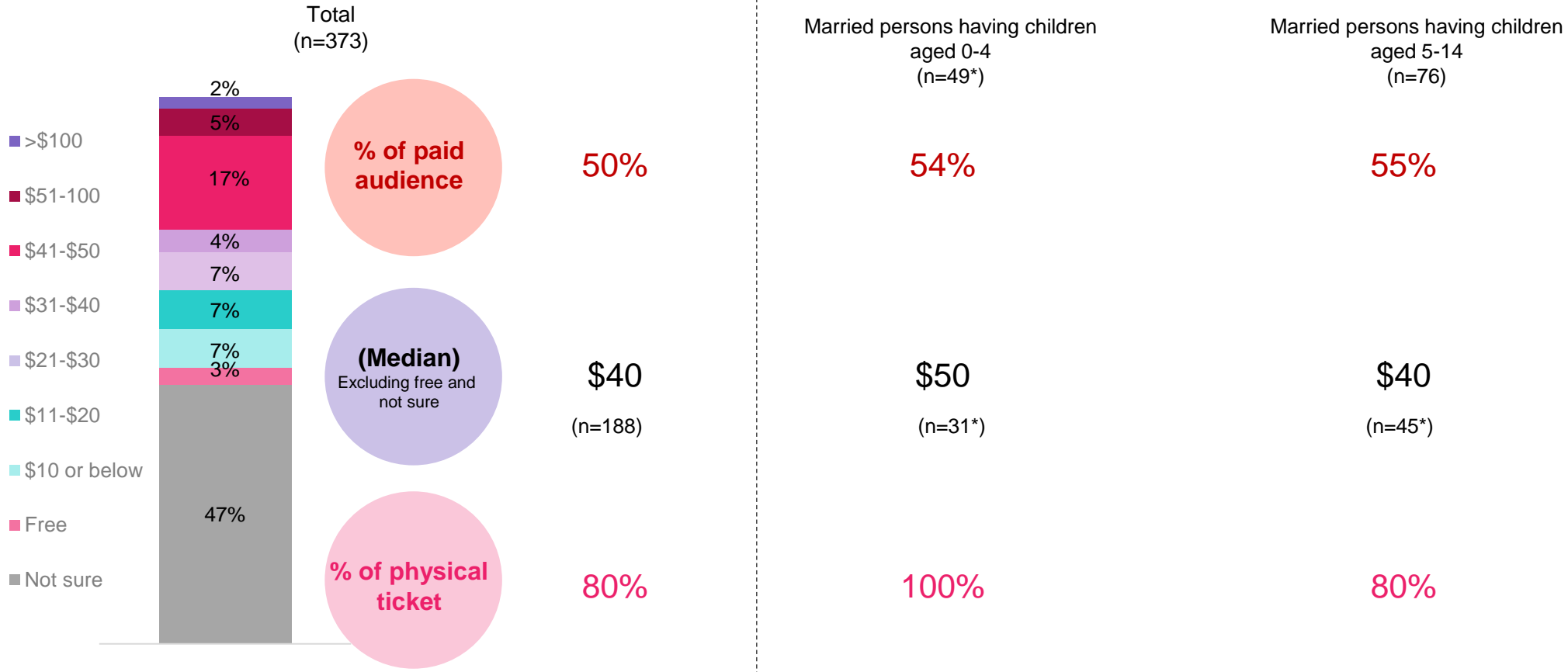
▲▼ Denote the figure of the segment is significantly higher/ lower than the total

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

Note to readers: The segment of married persons having children aged 15+ is not shown due to small base (n=13)

Assuming ticket price HKD50 for in-person admission

- Married persons having children aged 0-4 were willing to pay more for alternative-mode programmes.



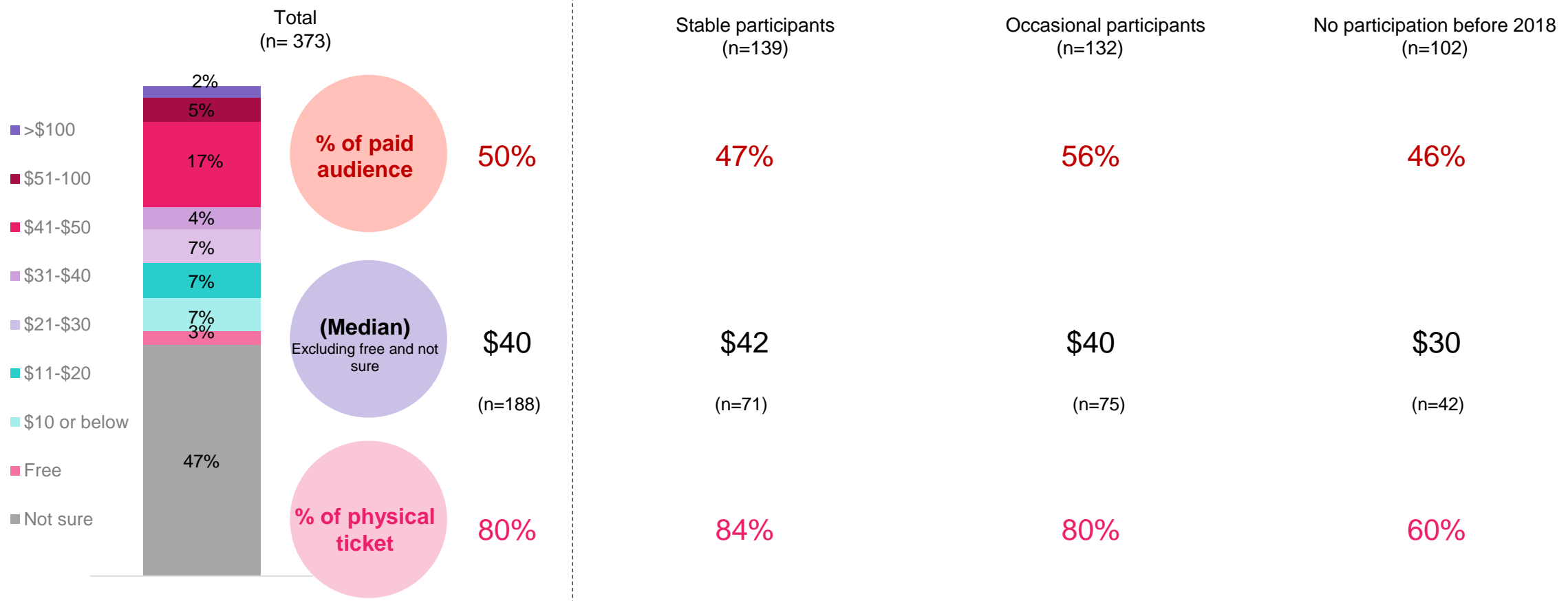
Base: Those consider alternative modes for participating respective art forms at post-COVID-19

▲ ▼ 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 – Visual Arts – by participation frequency

Assuming ticket price HKD50 for in-person admission

- The higher their participation frequency before 2018, the more the potential participants were willing to pay for alternative-mode Visual Arts exhibitions.



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

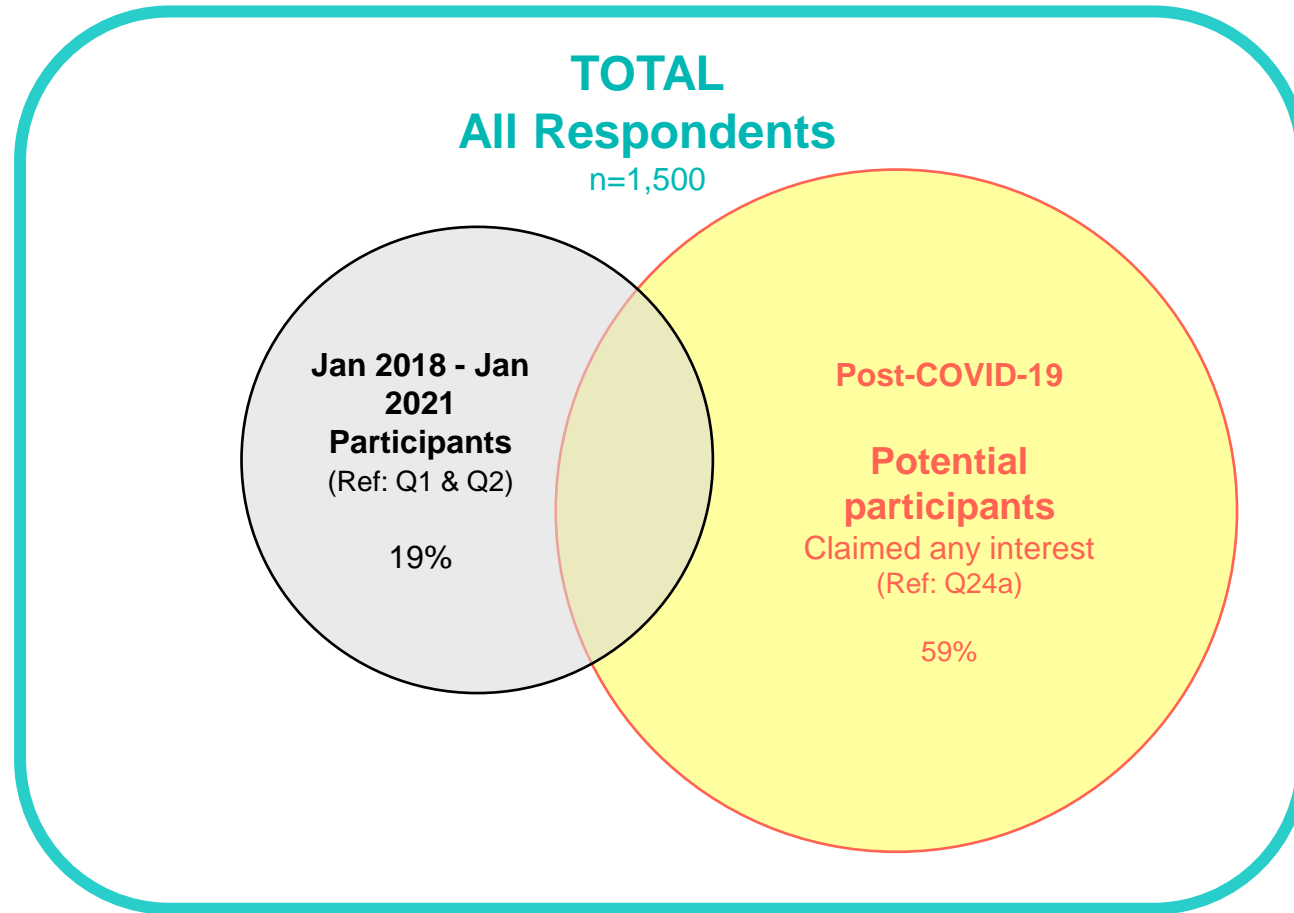
Base: Those consider alternative modes for participating respective art forms at post-COVID-19

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

Profiles of Potential Participants of Visual Arts

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

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



Profiles of potential participants - Visual Arts

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

	Total (n=1,500)	Participants in Jan 2018 – Jan 2021 (n=287)	Potential participants (n=915)
Gender			
Male	44%	39% ▼	43%
Female	56%	61% ▲	57%
Age Group			
16-24	13%	14%	13%
25-34	20%	31% ▲	23% ▲
35-44	22%	20%	24% ▲
45-54	22%	21%	22%
55-64	23%	14% ▼	18% ▼
Occupation			
Business owners/ Managers and professionals	14%	18% ▲	16% ▲
White-collar	27%	27%	28%
Blue-collar	34%	35%	35%
Housewives	7%	4% ▼	5% ▼
Students	9%	7%	9%
Retirees	3%	4%	3%
Unemployed	5%	6%	4% ▼
Life Segment			
Students	9%	7%	9%
Working singles	22%	25%	23%
Married persons having no children aged <18	24%	14% ▼	20% ▼
Married persons having children aged <18	32%	42% ▲	37% ▲
Education Level			
Secondary or below	45%	37% ▼	38% ▼
Post-secondary / University	55%	63% ▲	62% ▲
Monthly Household Income			
Below HKD 30,000	64%	58% ▼	58% ▼
HKD 30,000 - 49,999	24%	27%	28% ▲
More than HKD 50,000	12%	15%	14% ▲

	Total (n=1,500)	Participants in Jan 2018 – Jan 2021 (n=287)	Potential participants (n=915)
Region & living district			
Hong Kong Island	17%	19%	18%
Central & Western	3%	3%	4%
Eastern	8%	9%	8%
Southern	4%	4%	3%
Wan Chai	2%	3%	2%
Kowloon	30%	35% ▲	33% ▲
Kowloon City	6%	8%	6%
Kwun Tong	8%	6%	8%
Sham Shui Po	6%	9% ▲	7% ▲
Wong Tai Sin	6%	5%	6%
Yau Tsim Mong	4%	7% ▲	5%
New Territories	53%	46% ▼	50% ▼
Kwai Tsing	7%	6%	7%
North	5%	3%	5%
Sai Kung	7%	5%	5% ▼
Sha Tin	8%	6%	8%
Tai Po	4%	6%	4%
Tsuen Wan	4%	1% ▼	4%
Tuen Mun	8%	9%	7%
Yuen Long	8%	5%	7%
Islands	3%	3%	3% ▲

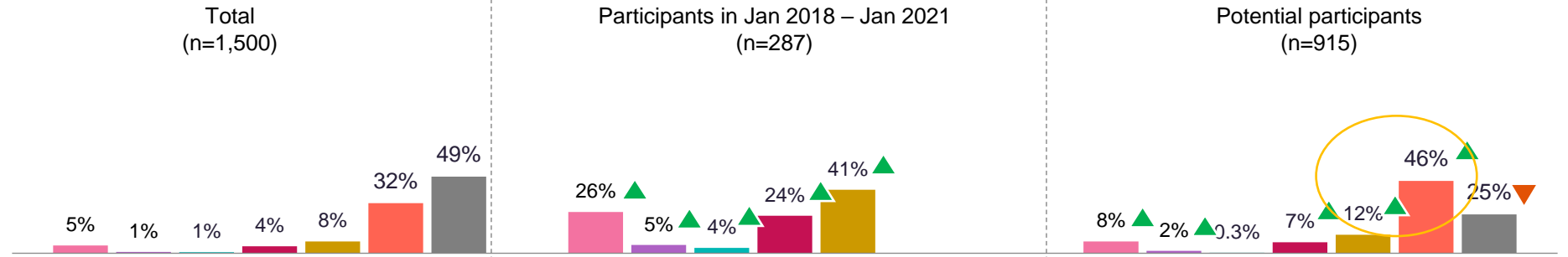
▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

Profiles of potential participants - Visual Arts

- Nearly 60% of potential participants were lapsed participants, meaning that they were still interested in Visual Arts despite their non-participation in this art form recently. (See slides 44-45 for reasons of non-participation of these lapsed participants)

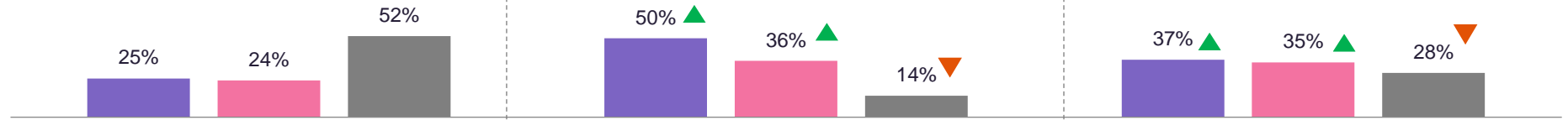
Distribution of segments

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



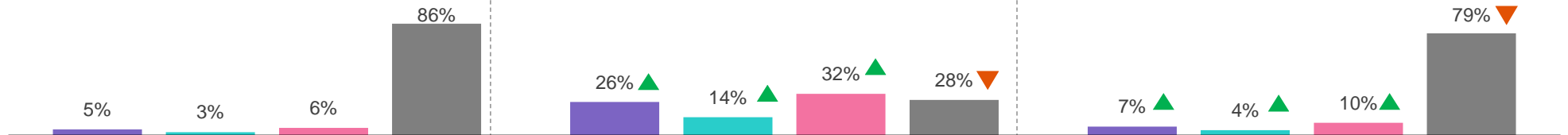
Participation before 2018

- Stable participation
- Occasional participation
- No participation



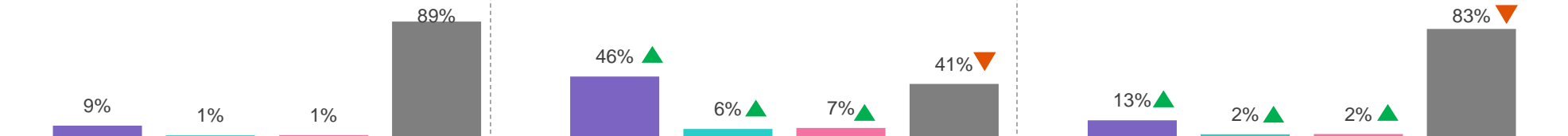
Mode of participation in 2018 – 2019

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



Mode of participation during COVID-19

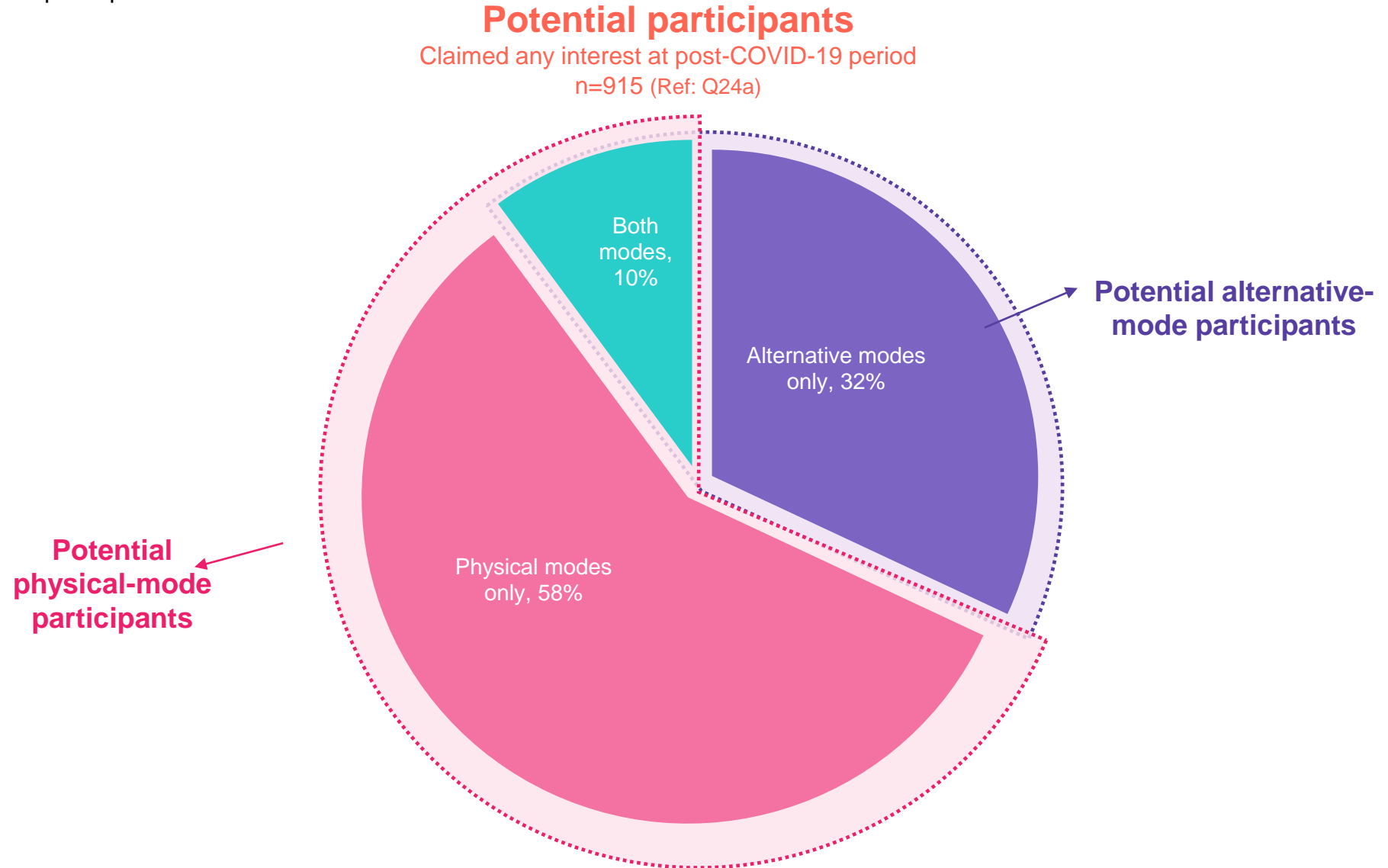
- Alternative modes only
- Both physical AND alternative modes
- Physical modes only
- No participation



Profile of Potential Participants – by Mode of Participation

Distribution of potential participants by mode preference – Visual Arts

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



Profiles of potential participants – Visual Arts – by mode of participation

- Compared to their physical-mode counterparts, potential alternative-mode participants were more skewed towards blue-collar workers with lower education level.

	Potential participants (n=915)	Potential physical-mode participants (n=643)	Potential alternative-mode participants (n=373)
Gender			
Male	43%	41%	45%
Female	57%	59%	55%
Age Group			
16-24	13%	14%	12%
25-34	23%	24%	21%
35-44	24%	23%	26%
45-54	22%	23%	22%
55-64	18%	17%	20%
Occupation			
Business owners/ Managers and professionals	16%	17%	15%
White-collar	28%	30%	25%
Blue-collar	35%	31%	38%
Housewives	5%	5%	4%
Students	9%	10%	8%
Retirees	3%	3%	5%
Unemployed	4%	3%	4%
Life Segment			
Students	9%	10%	8%
Working singles	23%	21%	26%
Married persons having no children aged <18	20%	21%	17%
Married persons having children aged <18	37%	38%	33%
Education Level			
Secondary or below	38%	31% ▼	48% ▲
Post-secondary / University	62%	69% ▲	52% ▼
Monthly Household Income			
Below HKD 30,000	58%	57%	60%
HKD 30,000 - 49,999	28%	27%	28%
More than HKD 50,000	14%	16%	12%

	Potential participants (n=915)	Potential physical-mode participants (n=643)	Potential alternative-mode participants (n=373)
Region & living district			
Hong Kong Island	18%	19%	17%
Central & Western	4%	4%	4%
Eastern	8%	10%	7%
Southern	3%	3%	3%
Wan Chai	2%	2%	3%
Kowloon	33%	32%	33%
Kowloon City	6%	7%	4%
Kwun Tong	8%	8%	8%
Sham Shui Po	7%	7%	8%
Wong Tai Sin	6%	5%	9%
Yau Tsim Mong	5%	5%	5%
New Territories	50%	49%	50%
Kwai Tsing	7%	7%	6%
North	5%	5%	3%
Sai Kung	5%	5%	5%
Sha Tin	8%	7%	10%
Tai Po	4%	3%	5%
Tsuen Wan	4%	4%	3%
Tuen Mun	7%	8%	5%
Yuen Long	7%	7%	7%
Islands	3%	2%	6%

Profiles of potential participants – Visual Arts – by mode of participation

- Compared to potential alternative-mode participants, more potential physical-mode participants only participated in person in 2018-2019. Hence there were also relatively more potential physical-mode participants who had lapsed since COVID-19 when physical attendance was less readily available.

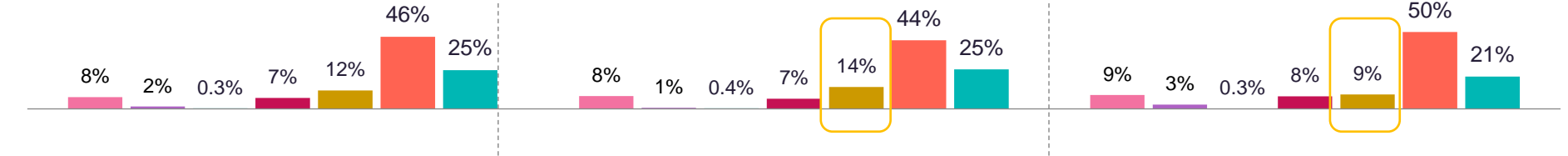
Distribution of segments

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

Potential participants (n=915)

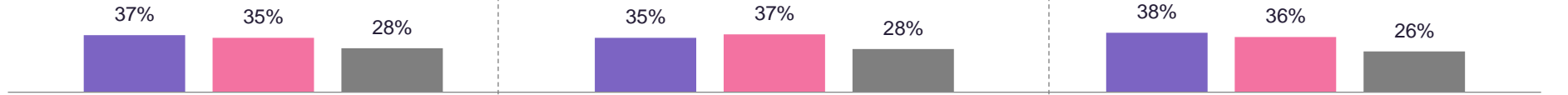
Potential physical-mode participants (n=643)

Potential alternative-mode participants (n=373)



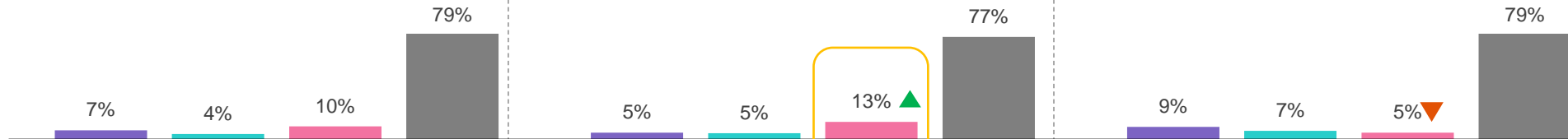
Participation before 2018

- Stable participation
- Occasional participation
- No participation



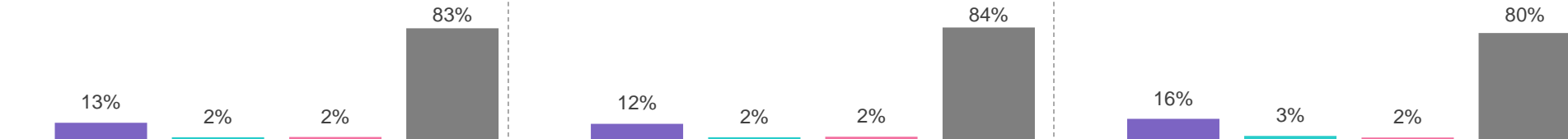
Mode of participation in 2018 – 2019

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



Mode of participation during COVID-19

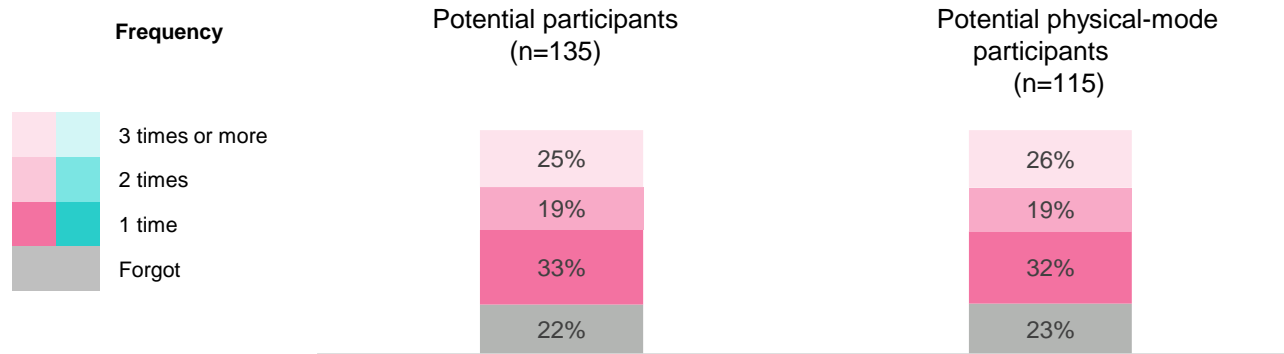
- Alternative modes only
- Both physical AND alternative modes
- Physical modes only
- No participation



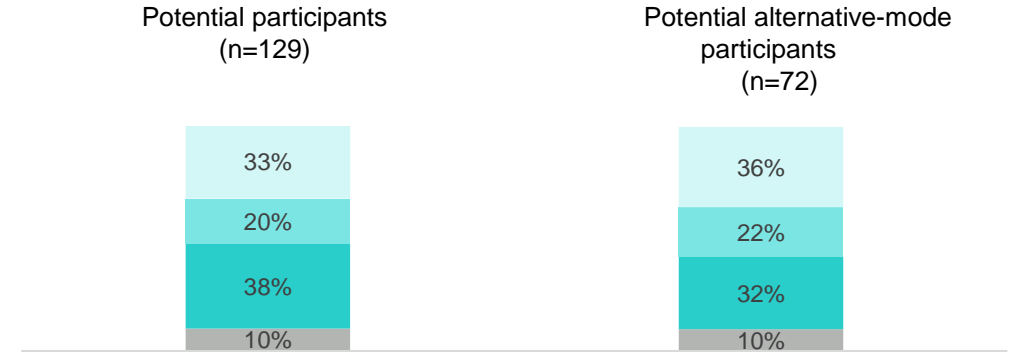
Profiles of potential participants – Visual Arts – by mode of participation

- Compared to all potential participants, those who expressed future interest in alternative modes participated more frequently in Visual Arts exhibitions in such modes during COVID-19. They also participated in more alternative-mode exhibitions that involved local artists.

Participation via physical modes in 2018-2019

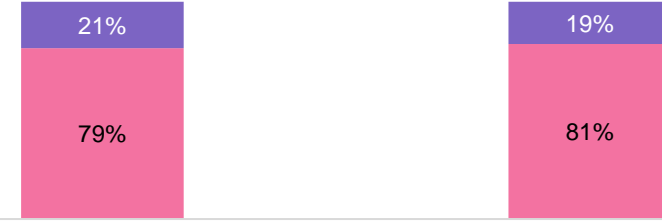


Participation via alternative modes during COVID-19



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.

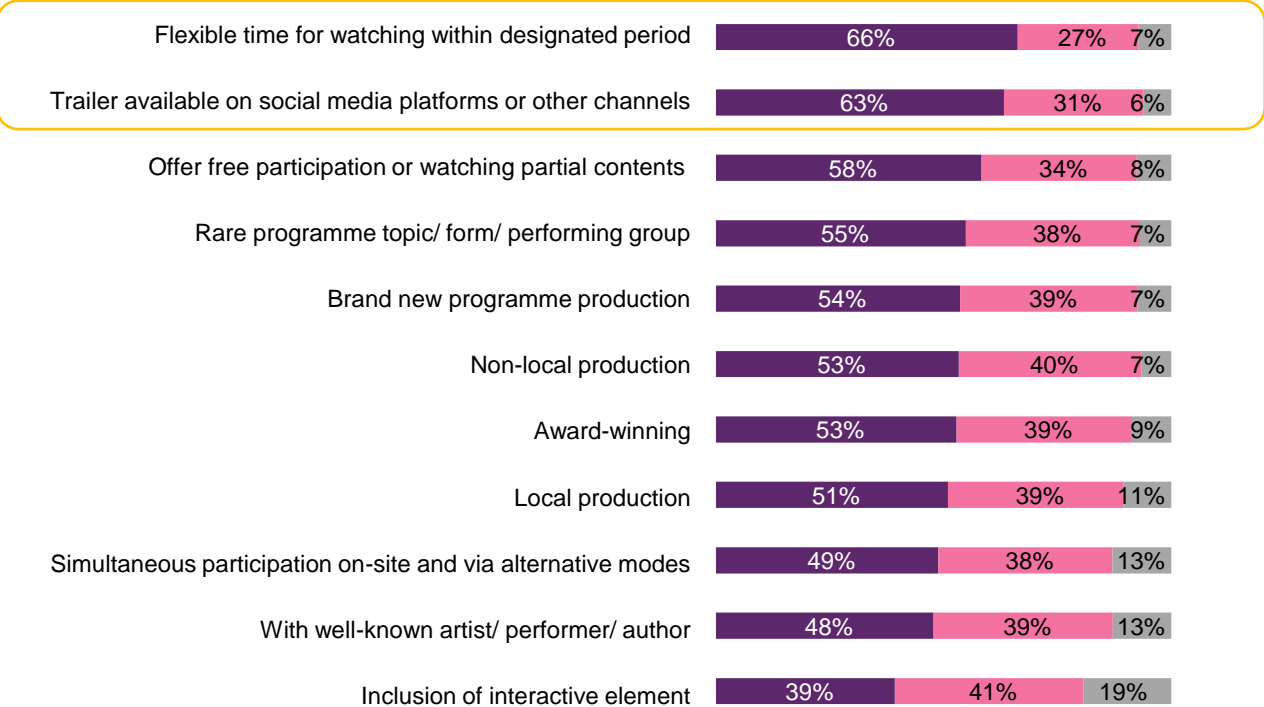
Profiles of potential participants – Visual Arts – important elements and information source for alternative modes

- Flexible time and online trailers were key drivers of alternative-mode participation.
- Social media platforms (65%) were the main source of information channel for alternative-mode programmes, followed by advertisements on mobile apps or websites (37%).

Important elements driving alternative modes

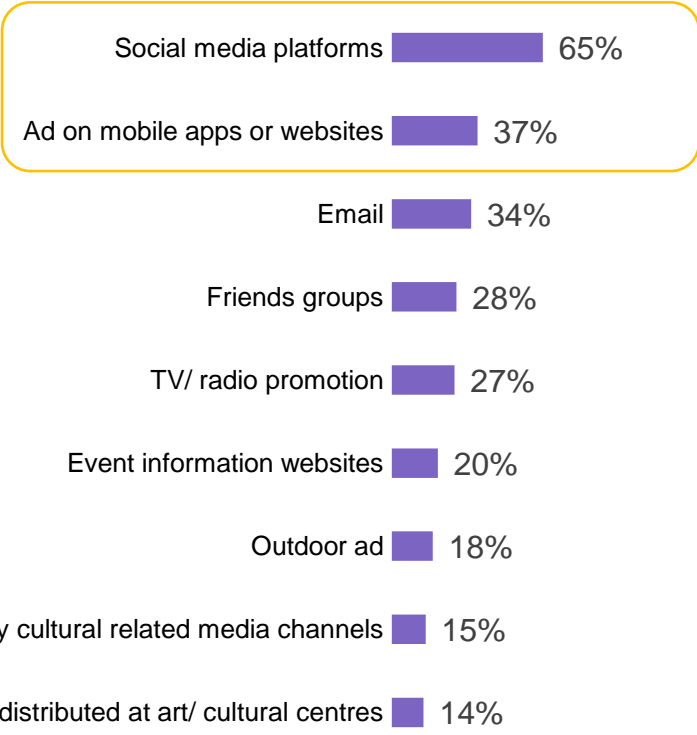
Potential alternative-mode participants (n=373)

- 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=343)

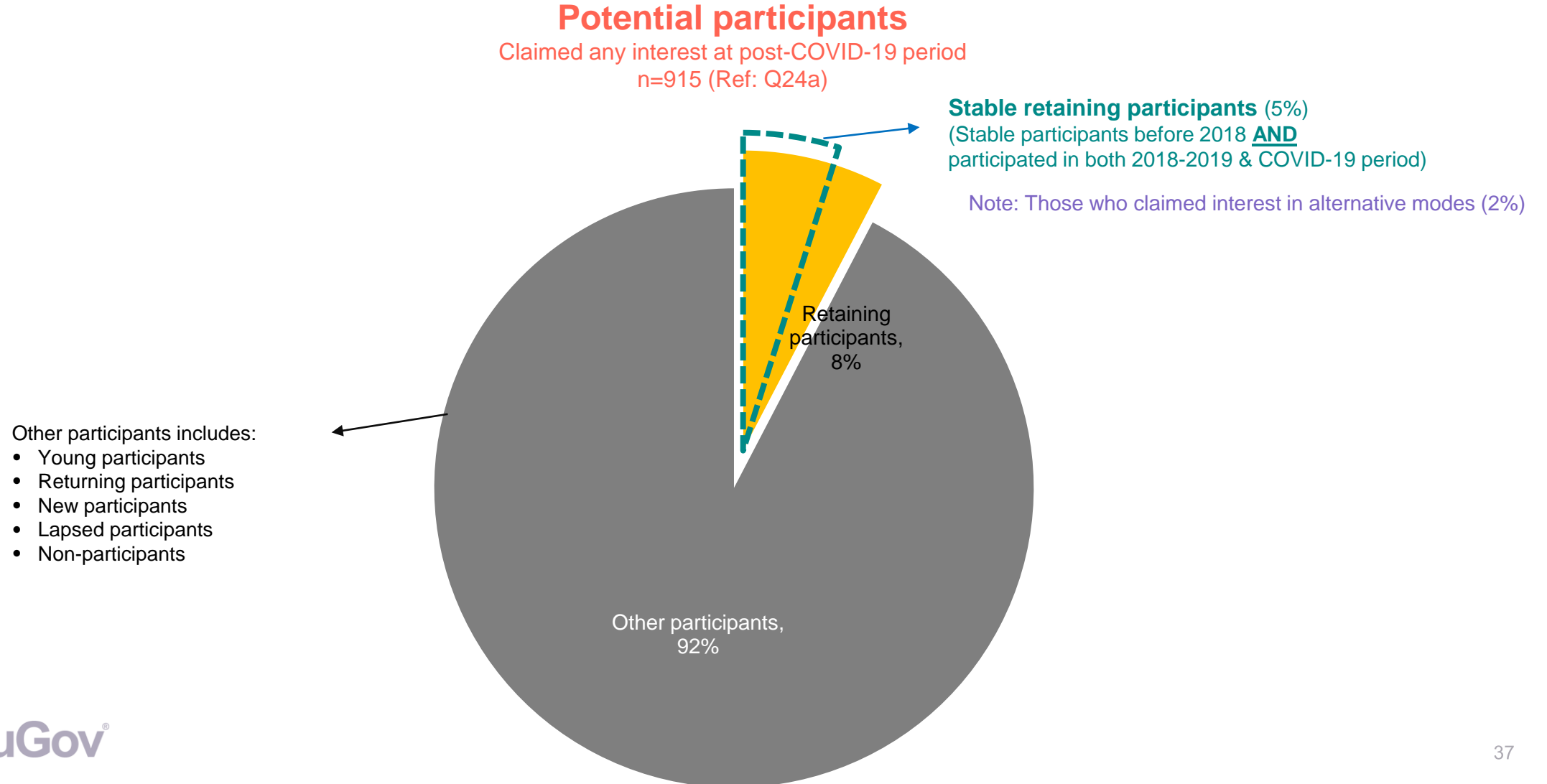


Note: For information source, respondents without awareness of or prior experience in alternative programmes are excluded, so the base does not cover all potential alternative-mode participants.

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

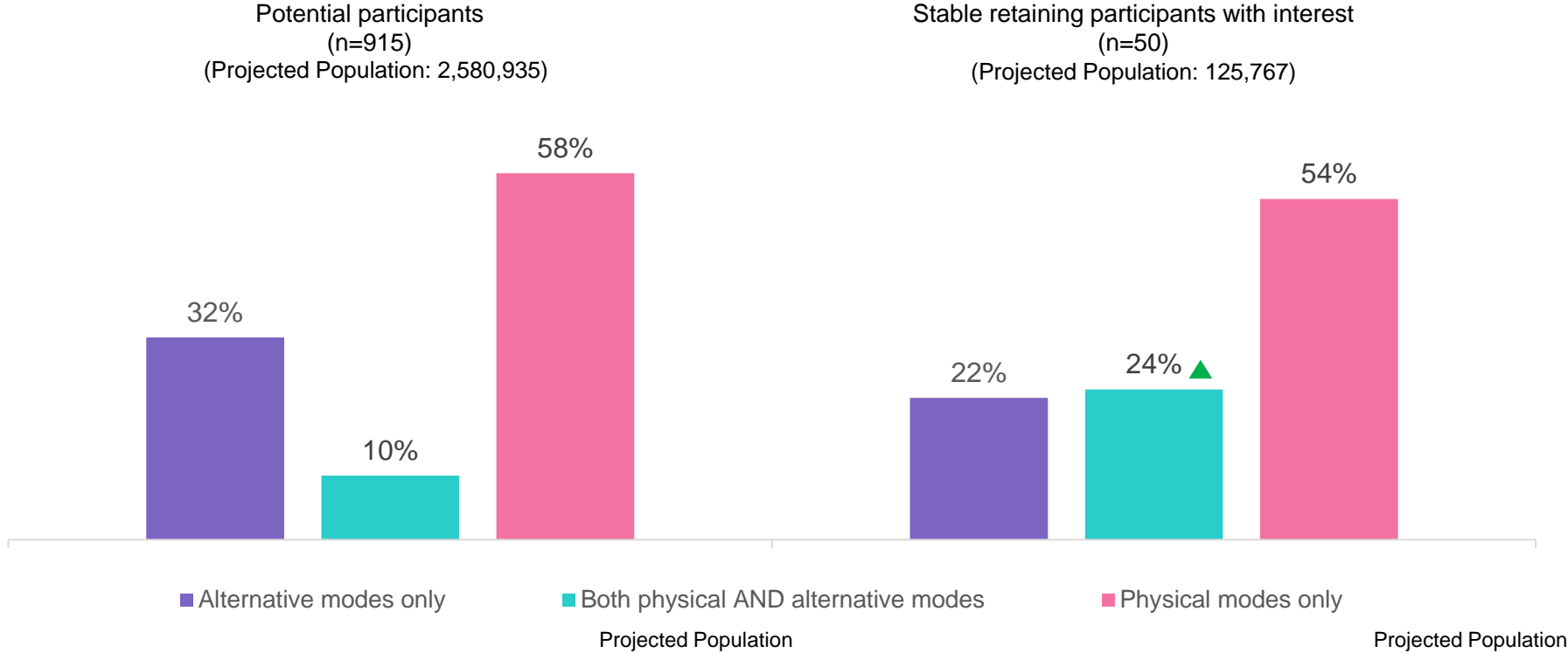
Proportion of stable retaining participation with interest among potential participants – Visual Arts

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



Stable retaining participants with participation interests at post-COVID-19 period – Visual Arts

- Similar to all potential participants, stable retaining participants with future participation interest shown a clear preference for physical modes over alternative ones, although nearly a quarter were agreeable to participation in either mode as well.



Any Alternative mode

42%

1,086,573

46%

58,064

Any Physical mode

68%

1,756,109

78%

97,567



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 interests at post-COVID-19 period – Visual Arts

- Stable retaining participants with interest were skewed towards 25-34 years old with higher education level and household income.

	Total (n=1,500)	Potential participants (n=915)	Stable retaining participants with interest (n=50)
Gender			
Male	44%	43%	49%
Female	56%	57%	51%
Age Group			
16-24	13%	13%	8%
25-34	20%	23% ▲	34% ▲
35-44	22%	24% ▲	17%
45-54	22%	22%	33%
55-64	23%	18% ▼	9% ▼
Occupation			
Business owners/ Managers and professionals	14%	16% ▲	31% ▲
White-collar	27%	28%	31%
Blue-collar	34%	35%	22%
Housewives	7%	5% ▼	2%
Students	9%	9%	-
Retirees	3%	3%	5%
Unemployed	5%	4% ▼	9%
Life Segment			
Students	9%	9%	-
Working singles	22%	23%	29%
Married persons having no children aged <18	24%	20% ▼	20%
Married persons having children aged <18	32%	37% ▲	37%
Education Level			
Secondary or below	45%	38% ▼	15% ▼
Post-secondary / University	55%	62% ▲	85% ▲
Monthly Household Income			
Below HKD 30,000	64%	58% ▼	44% ▼
HKD 30,000 - 49,999	24%	28% ▲	38% ▲
More than HKD 50,000	12%	14% ▲	18%

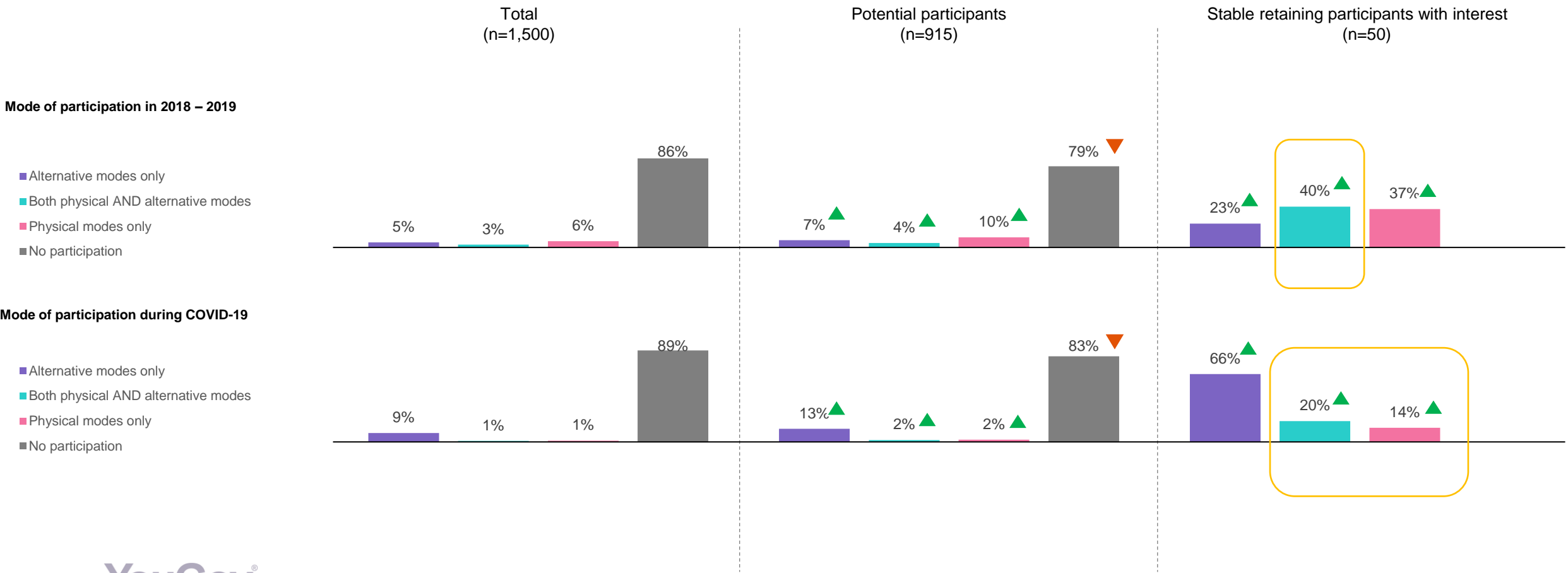
	Total (n=1,500)	Potential participants (n=915)	Stable retaining participants with interest (n=50)
Region & living district			
Hong Kong Island	17%	18%	27%
Central & Western	3%	4%	10% ▲
Eastern	8%	8%	6%
Southern	4%	3%	6%
Wan Chai	2%	2%	5%
Kowloon	30%	33% ▲	25%
Kowloon City	6%	6%	6%
Kwun Tong	8%	8%	6%
Sham Shui Po	6%	7% ▲	5%
Wong Tai Sin	6%	6%	1%
Yau Tsim Mong	4%	5%	7%
New Territories	53%	50% ▼	47%
Kwai Tsing	7%	7%	1%
North	5%	5%	0%
Sai Kung	7%	5% ▼	2%
Sha Tin	8%	8%	11%
Tai Po	4%	4%	13% ▲
Tsuen Wan	4%	4%	0%
Tuen Mun	8%	7%	15%
Yuen Long	8%	7%	3%
Islands	3%	3% ▲	2%



▲ ▼ 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 – Visual Arts

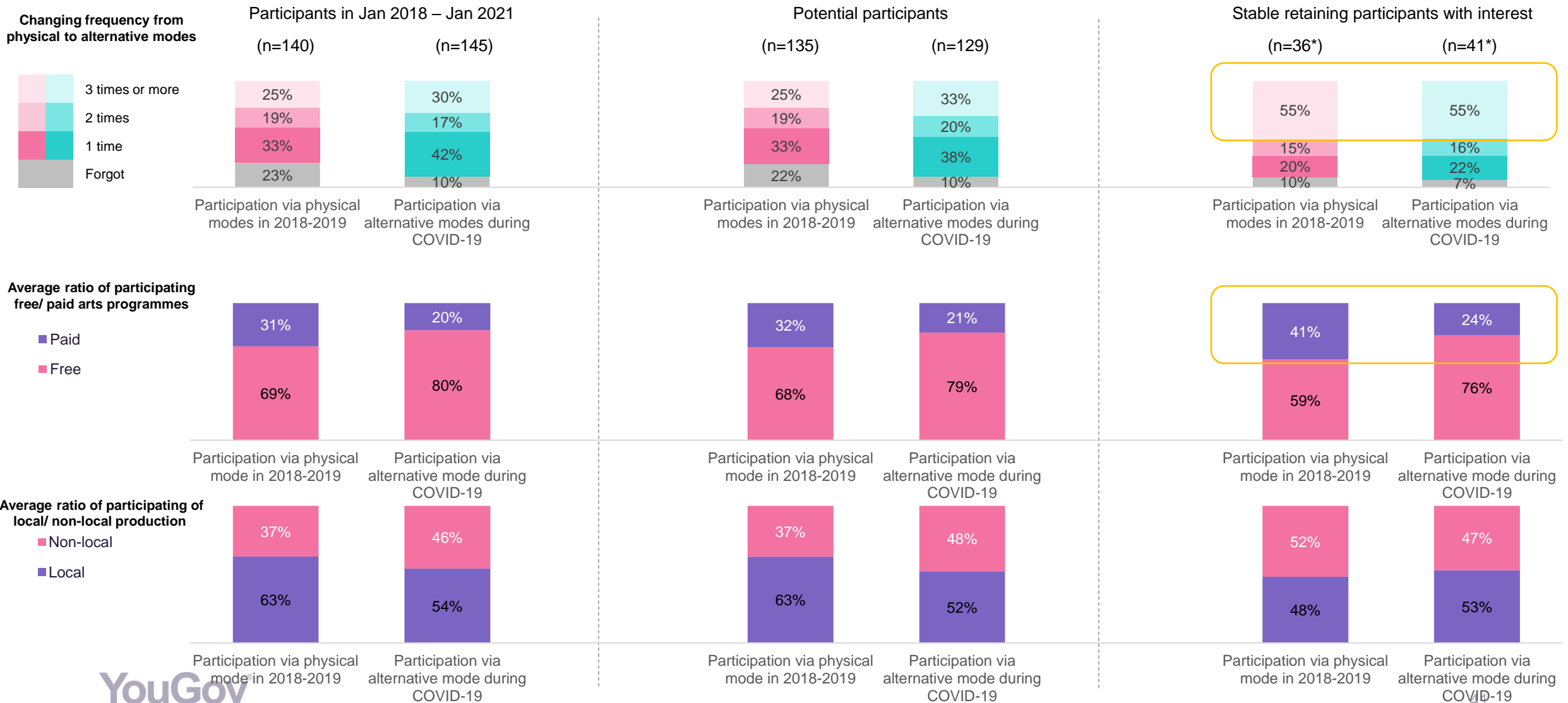
- 40% of stable retaining participants with interest had participated in both physical- and alternative-mode Visual Arts exhibitions in 2018-2019. Even during COVID-19 outbreak when physical attendance at exhibitions was less readily available, one-third of stable retaining participants with interest still managed to take part in physical exhibitions.



▲ ▼ 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 – Visual Arts

- Stable retaining participants with interest had been frequent participants in either physical or alternative modes, and they took part in more paid exhibitions as well.



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.

Note to readers: Acceptable price level, important elements and information source for arts participation via alternative modes at post-COVID-19 period are not shown for Stable retaining participants with interest in alternative modes due to small base (n=24).

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

Distribution of potential participants by type of participants - Visual Arts

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

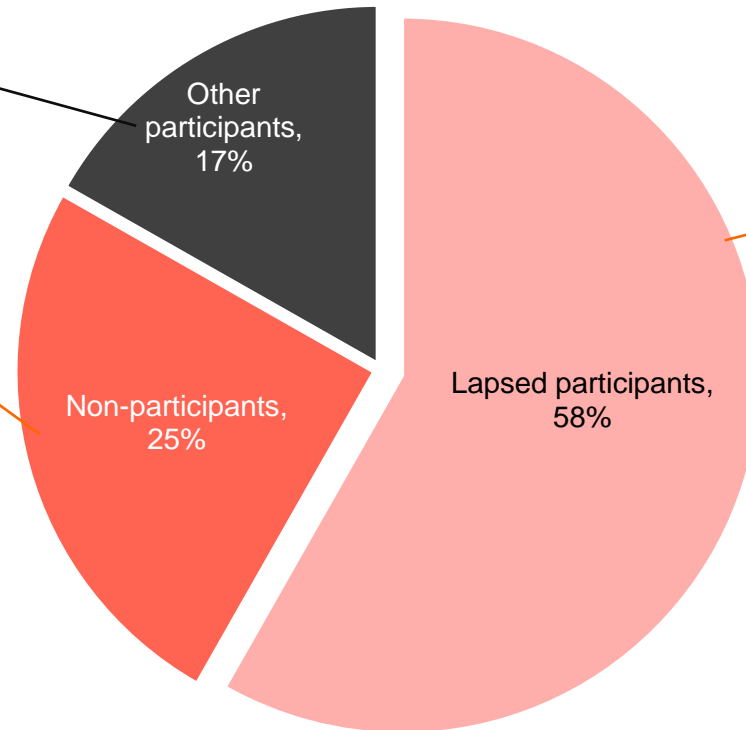
Amongst potential participants, a portion of them are lapsed participants or non-participants. The following slides will look into the reasons for not participating in 2018-2019 or during COVID-19 for these subgroups.

Potential participants
 Claimed any interest at post-COVID-19 period
 n= 915 (Ref: Q24a)

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

- Those who claimed interest in
- Physical modes (17%)
 - Alternative modes (9%)

- Those who claimed interest in
- Physical modes (40%)
 - Alternative modes (25%)



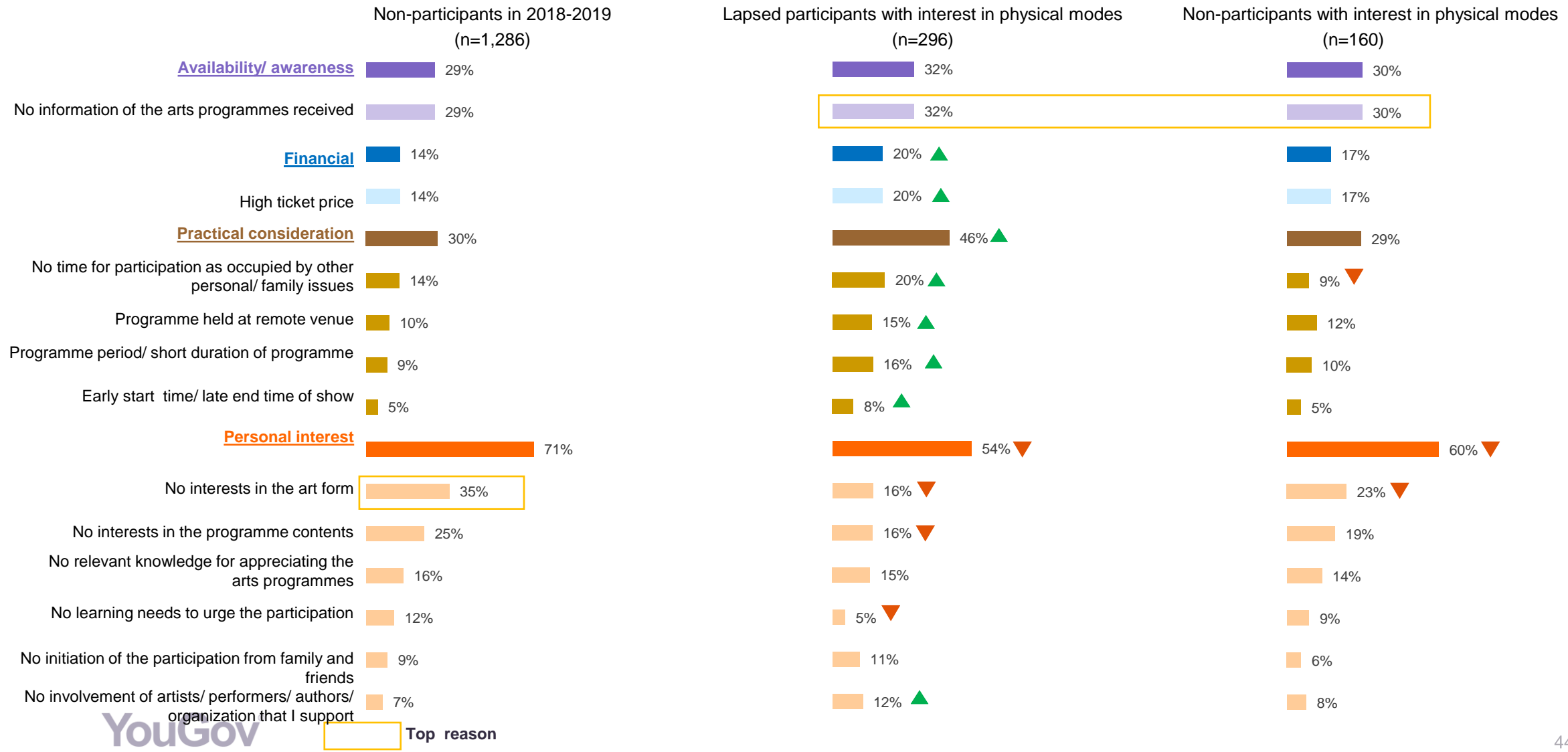
Other observations:

	Potential physical-mode participants	Non-participants with interest in physical modes
Female	59%	66%

	Potential alternative-mode participants	Non-participants with interest in alternative modes
Married persons having no children aged <18	17%	26%
Post-secondary / University	52%	62%

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

- Lack of exhibition information was the main barrier for lapsed participants and non-participants in 2018-2019 despite their interest in Visual Arts.
- A considerable portion of lapsed participants with interest also suggested that they had been discouraged by high ticket price.



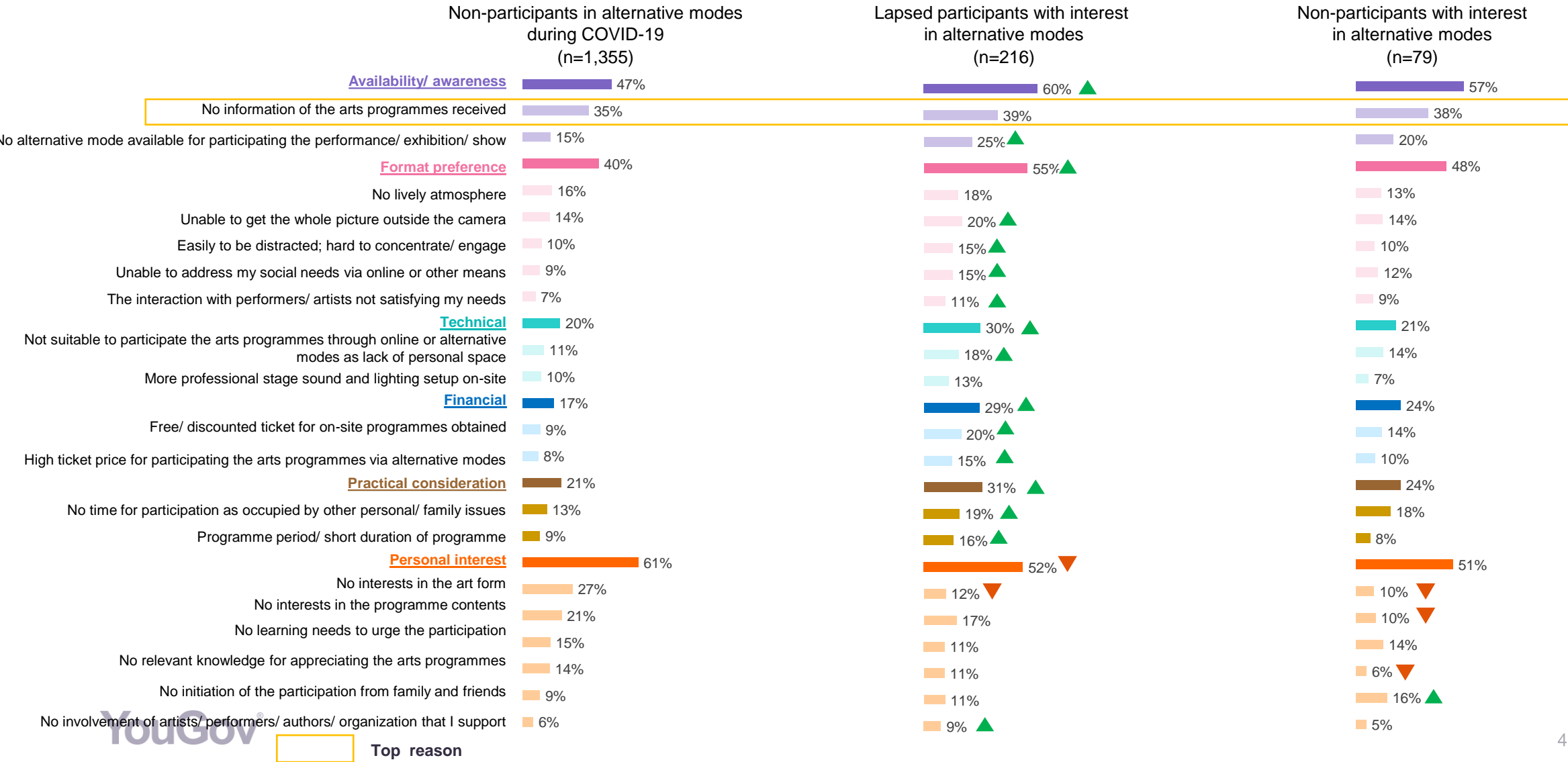
Top reason

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 Visual Arts programme in 2018-2019

▲ ▼ Denote the figure of the segment is significantly higher/ lower than non-participants in 2018-2019

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

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



Base: Non-participants of Visual Arts programme via alternative modes during COVID-19
 ▲ ▼ Denote the figure of the segment is significantly higher/ lower than the non-participants in alternative modes during COVID-19

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 – Visual Arts

- Non-participants would in general be more willing to participate in alternative modes even when physical participation was available.

