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August 2021

# **Behavioural Study on Arts Participants Survey Report on Alternative Modes of Arts Participation**



香港藝術發展局  
Hong Kong Arts Development Council

# About the Survey

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# Research Framework



## Research Objectives

- To gauge public awareness and incidences of alternative modes of arts participation;
- To examine the participation patterns, reasons and views towards alternative modes of arts participation under different conditions (e.g. with/without a paywall, live-streaming or recorded materials, possibility of physical attendance); and
- To understand how arts participants evaluate the experience of alternative modes of arts participation, their arts participation history and future intention by alternative modes.



## Respondent Criteria

General population aged 16-64 in Hong Kong



## Methodology & Fieldwork Period

Online quantitative interviews recruited from YouGov proprietary panel between 11 and 22 January 2021



## Sample Composition

Data weighting is applied in each country, based on the distribution by gender, age, region and employment status.

The sample of 1,500 are projected to the Hong Kong population aged 16-64: 4,339,112.

Source from Census Department, Hong Kong (<https://www.statistics.gov.hk/pub/B10101232020AN20B0100.pdf>) , excluding the low education below primary school (circa 18% of total population)

# Sample Profile

Gender		Region		Occupation	
Male	44%	Hong Kong Island	17%	Business owners/ Managers and professionals	14%
Female	56%	Central & Western	3%	White-collar	27%
		Eastern	8%	Blue-collar	34%
<b>Age Group</b>		Southern	4%	Housewives	7%
16 – 24	13%	Wan Chai	2%	Students	9%
25 – 34	20%	Kowloon	30%	Retirees	3%
35 – 44	22%	Kowloon City	6%	Unemployed	5%
45 – 54	22%	Kwun Tong	8%		
55 – 64	23%	Sham Shui Po	6%	<b>Education Level</b>	
		Wong Tai Sin	6%	Primary school (P1-P6)	3%
<b>Life Stage</b>		Yau Tsim Mong	4%	Junior Secondary (F1-F3)	5%
Students	9%	New Territories	53%	Senior secondary (F4-F6/7)	37%
Working singles	22%	Kwai Tsing	7%	Non-Degree Tertiary	15%
Married persons having no children aged <18	24%	North	5%	University degree (e.g. BA, BSc, B.Ed)	26%
Married persons having children aged <18	32%	Sai Kung	7%	University higher degree (Masters, MBA, PhD)	12%
• Married persons having children aged 0 – 4	12%	Sha Tin	8%	Professional higher education (e.g. to qualify as a lawyer, accountant)	3%
• Married persons having children aged 5 - 14	19%	Tai Po	4%		
• Married persons having children aged 15+	6%	Tsuen Wan	4%	<b>Monthly Household Income</b>	
Retirees	3%	Tuen Mun	8%	Below HKD30,000	64%
		Yuen Long	8%	HKD 30,000 - 50,000	24%
		Islands	3%	More than HKD 50,000	12%

## Notes to Readers

- Small base - Data based on a small base size should be interpreted with caution.
  - Unweighted sample base less than n=30 will not be shown, including segment of retirees.
  - Unweighted sample base less than n=50 is marked with “\*”.
- Figures are rounded to whole numbers, hence may not add up to 100%.
- Significant test results are based on 95% confidence level.
  - ▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total
  - Gap in Green/ Red denotes significance based on 95% confidence level compared to previous period
- Questions on participation incidence over the years cover arts participation by either physical or alternative modes, and the timeframe may not cover the whole years of 2018, 2019 and 2020. Hence the percentage changes between the period of COVID-19 outbreak and the two years before COVID-19 outbreak, as well as those between the two years before COVID-19 outbreak and the period before 2018, do not indicate any yearly comparison.
- For simplicity, “In 2018-2019” denotes the 2 years before the outbreak of COVID-19 and “during COVID-19” denotes the period from Jan 2020 to Jan 2021 (the time of survey fieldwork).
- For the purpose of this survey, Literary Arts includes Literary Reading and other types of Literary Activities. As this survey focuses mainly on the behaviour of (potential) participants in arts programmes, only the participation behaviour and characteristics of Literary Activity participants have been studied for Literary Arts. Findings for Literary Activity participants do not suggest the same or similar patterns for literary readers since not all Literary Activity participants are concurrently literary readers in the respective timeframe, nor vice versa.

## Assumptions and Limitations

- To improve the representativeness of the samples, quotas were applied on gender, age, living district, marital status, occupation, monthly household income and education level.
- To gauge the behaviours of existing and potential alternative-mode arts audiences, online methodology was used in this survey. Due to relatively lower penetration of online usage for elderly (aged 65+), this study focused only on people aged 16 – 64 years old.
- Due to art form features and characteristics, certain art form participants (such as Xiqu) might be skewed towards older age groups (aged 65+) which were not interviewed, as a result the participation incidence in these art forms is lower in this study via online methodology.
- YouGov’s online panel covers age 16-75 with over 60% of panelists having attained the highest education at tertiary education level or above. The proportion of respondents with primary or secondary education levels were small in our study because of the limited reach of these respondents via online methodology.
- Findings on participation interest at post COVID-19 period have been compared with the net participation incidence before and during COVID-19 (i.e. the period from Jan 2018 to Jan 2021), rather than that during COVID-19 alone, so as to give a more realistic analysis of claimed future interest vis-à-vis the actual participation in recent years.
- Respondents who did not participate in a particular art form in all time periods due to no interest in that art form were not asked on their future intention to participate in that art form; it was assumed that they would not participate in the respective art form at post COVID-19 period.
- Respondents who did not participate in a particular art form in all time periods due to no interest in that art form were also not asked on their other kinds of involvement in that art form during COVID-19; it was assumed that they did not have any kind of participation in the respective art form during the period.

# Key Highlight Summary

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# Key Highlight Summary

## Changes in Arts Participation during COVID-19

- 6 in 10 respondents, or a projected population of 2.63 million aged 16-64, participated as audience in at least one art form during COVID-19, equivalent to a drop of 13 percentage points as compared with the period before COVID-19 outbreak (i.e. in 2018-2019). Despite the decline of participation due to COVID-19 outbreak, Film and Media Arts (35%), Literary Reading (26%) and Literary Activities (24%) remained the most popular among the nine art forms, whereas Dance (9%), Multi-Arts (10%) and Visual Arts (11%) were the least popular.
- The general decline in arts participation could be attributed by the lack of information received for alternative-mode arts programmes during COVID-19 in most art forms, except Xiqu and Literary Activities where non-participation was mainly due to lack of interest in the art form.
- Women were generally more affected by COVID-19 in terms of arts participation. Their participation declined significantly for almost all art forms except Multi-arts. The limited availability of physical-mode programmes could be a reason for their less active arts participation during the epidemic.
- Respondents aged 25-34 or married persons having children under the age of 18 were relatively more active in arts participation during COVID-19 – over one-third of them participated in more than 2 art forms, significantly higher than other age groups or life segments. These two groups of respondents were also the most interested in post-Covid-19 participation in all art forms.
- Those aged 45-54 were influenced by COVID-19 the most – their arts participation dropped by 22 percentage points as compared with the period in 2018 – 2019.
- Across the nine art forms, Film and Media Arts had the strongest resilience of participation – 1 in 4 people had participated in this art form before 2018 and continued through the COVID-19 epidemic.
- Despite small proportions of people who picked up arts participation (i.e. returning/ new participants) during COVID-19, in all art forms, there were comparatively more participants who had ceased participation since the epidemic. Aggregating all art forms, around 30% of returning and new participants were aged 25-34.



# Key Highlight Summary

## Key Consideration Factors in Arts Participation

- Programme content (51%), price (42%) and time (32%) were commonly seen as the top 3 most important factors when considering arts participation. Married persons having children aged 18 below especially saw the importance of having suitable programme format, children/ family-friendly elements and priority screening. In particular, married persons having children aged 14 or below put more attention on children/ family-friendly elements than those with older children, possibly because these parents were more likely to participate in arts programmes with their young children.

## Participation in Alternative Modes

- Social distancing measures during COVID-19 outbreak have changed the patterns of arts participation. Among arts participants, 92% had participated via alternative modes during COVID-19 while physical-mode participation fell to 46%, compared with 70% and 73% in 2018-2019 respectively. Every alternative mode studied witnessed a growth in participation incidence during COVID-19, with platforms for sharing (e.g. Facebook, YouTube), TV/ radio broadcast and paid video on demand platforms being the most popular modes.
- Convenience (51%), comfortability (50%) and flexibility (45%) were found to be the biggest advantages of alternative-mode arts programmes. More than one third of respondents also opined that alternative modes provided more programme options in terms of both geographical reach and affordable price range. However, the lack of professional stage sound and light setup (43%), incomprehensive experience (34%) and the difficulty to concentrate (33%) were the major hassles to alternative-mode participation.
- While alternative modes were the dominant channel of arts participation during COVID-19 for all art forms, the population of alternative-mode participants remained largely the same as before the epidemic. In other words, the growth in alternative-mode participation could not offset the greater loss in physical-mode participation, thus resulting in an overall drop in arts participation incidence.

# Key Highlight Summary

## Raising Awareness of Alternative-mode Programmes

- During COVID-19, 3 out of 4 people were aware of alternative-mode arts programmes in at least one art form. Looking at individual art forms, the awareness level was the highest for Film and Media Arts programmes at 51%, and the lowest for Xiqu (18%), Multi-arts (19%) and Dance (20%). This might explain why the lack of information was often cited as a major reason for not participating in alternative-mode programmes during COVID-19.
- The awareness of alternative-mode programmes was higher for people aged 25-34 for most art forms which was in line with their higher participation rate during COVID-19. By comparison, the awareness levels for older age groups (aged 45-54 and 55-64) were generally lower.
- In view of this, a continuous effort on enhancing the promotion strategy should be reinforced with more cross-programme or cross-channel opportunities to gain more awareness and traction with those single-type arts participants or non-participants in the respective art forms. Social media platforms (64%) were the main information channel for alternative-mode programmes across all age groups and life segments, while ads on mobile apps or websites were also suitable for male and young generation aged 16-24. Emails could be useful in reaching those aged 45-54 and male as well. People aged 55-64 relied more on TV/ radio promotion for information.

# Key Highlight Summary

## Motivation for Alternative-mode Participation

- 86% of respondents expressed interest in arts participation when the COVID-19 outbreak would be over. Although physical participation was more preferable across all art forms at post-COVID-19 period, the claimed interest in alternative-mode programmes (69%) was still slightly higher than the actual participation incidence in alternative modes (66%) before and during the epidemic.
- A majority of these potential alternative-mode participants would prefer alternative modes over physical ones if the programme offers flexible time (63%), online trailer (61%) or free participation (58%).
- Married persons having children valued different elements at different children's ages. Trailer availability would drive those with toddlers (aged 0-4); time flexibility would attract those with young children (aged 5-14); and free or partial participation would be favourable for those having children aged 15+.
- To motivate stronger arts participation in alternative modes, arts programmes should be designed in flexible formats so that the potential arts participants can have more flexibility to plan the arts activities during their busy working schedule or for their children. Trailer with more information about the programme content definitely helps the programme selection.

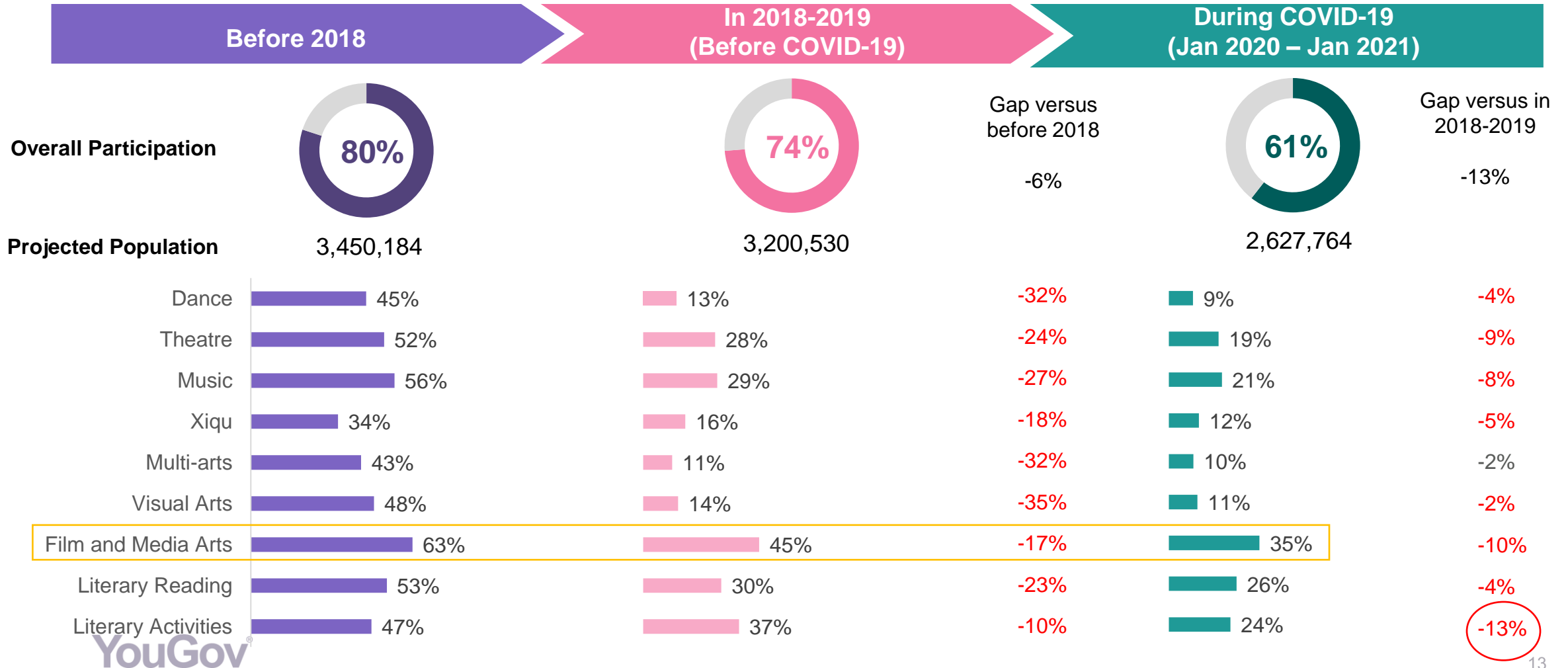
# Arts Appreciation – Market Overview



# Arts participation over time

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

- 6 in 10 respondents participated in arts appreciation of at least one art form during COVID-19, marking a decline of 13 percentage points from the period before the epidemic (i.e. in 2018-2019). Participation in Literary Activities dropped the most (by 13 percentage points), whereas Film and Media Arts remained the most popular art form across all measured periods.



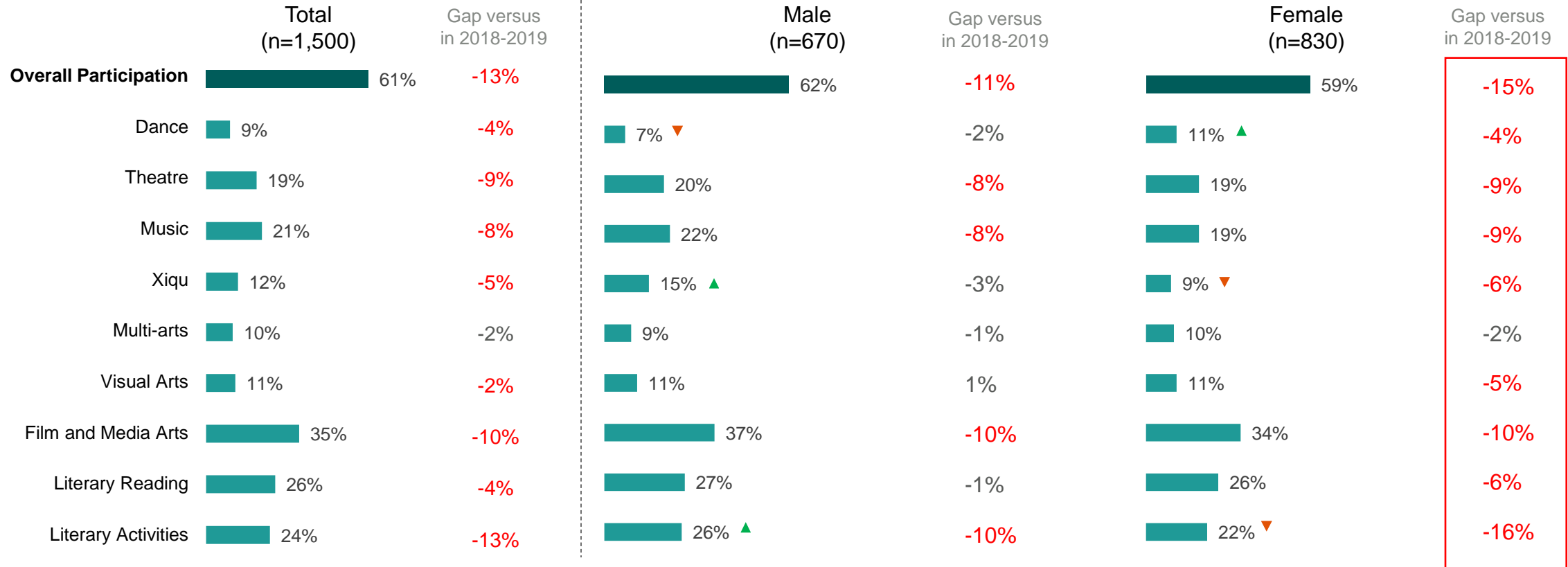
Base: All respondents, n=1,500

Gap in Green/ Red denotes significance based on 95% confidence level compared to previous period

# Arts participation over time – by gender

- Women were generally more affected by COVID-19 in terms of arts participation – their participation declined significantly for almost all art forms except Multi-arts. This might partly be due to women’s relative higher emphasis on programme atmosphere which could not be easily replicated in alternative modes.
- During COVID-19, men were more likely to take part in Literary Activities and Xiqu while women were more likely to take part in Dance.

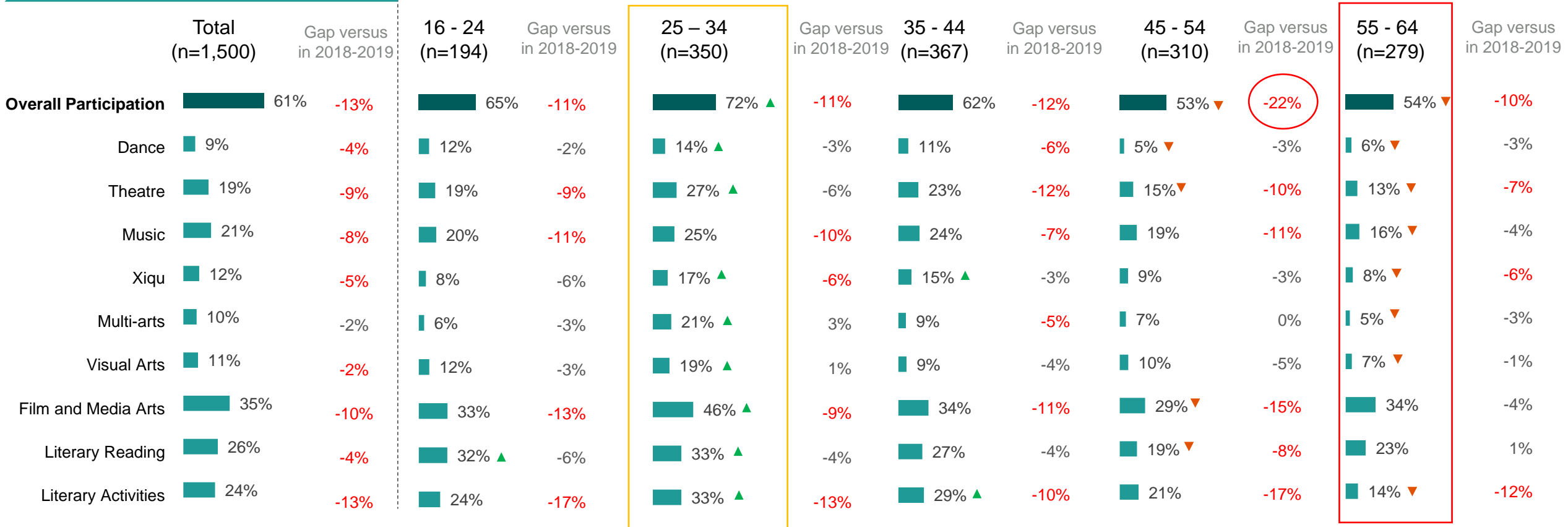
**During COVID-19**  
(Jan 2020 – Jan 2021)



# Arts participation over time – by age groups

- Across most art forms, people aged 25-34 were more active in participation during COVID-19 as opposite to the older generation (aged 55-64). People aged 45-54 were influenced by COVID-19 the most – their arts participation dropped by 22 percentage points as compared with the period in 2018-2019.

**During COVID-19  
(Jan 2020 – Jan 2021)**



Base: All respondents, n=1,500

Gap in Green/ Red denotes significance based on 95% confident level compared to previous period

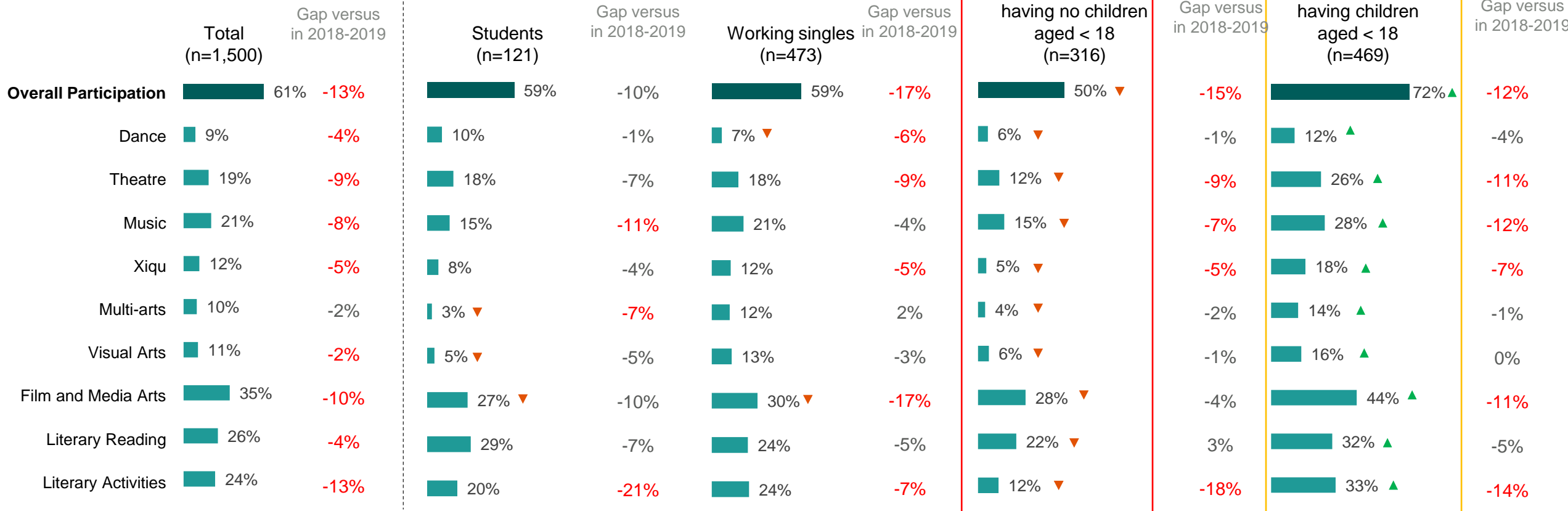
▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

# Arts participation over time – by life segments

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

- Married persons having children aged under 18 actively took part in arts programmes during COVID-19, possibly as family activities with children as they were also the segment that focused more on children/ family-friendly elements in considering arts programmes.
- The arts participation for married persons having no children aged under 18 were low - as the majority of them was in the older age group (53% were aged 55-64 and 26% aged 45-54), the finding was in line with that for the older age group as seen from the previous slide.

**During COVID-19  
(Jan 2020 – Jan 2021)**



Base: All respondents, n=1,500

Gap in Green/ Red denotes significance based on 95% confident level compared to previous period

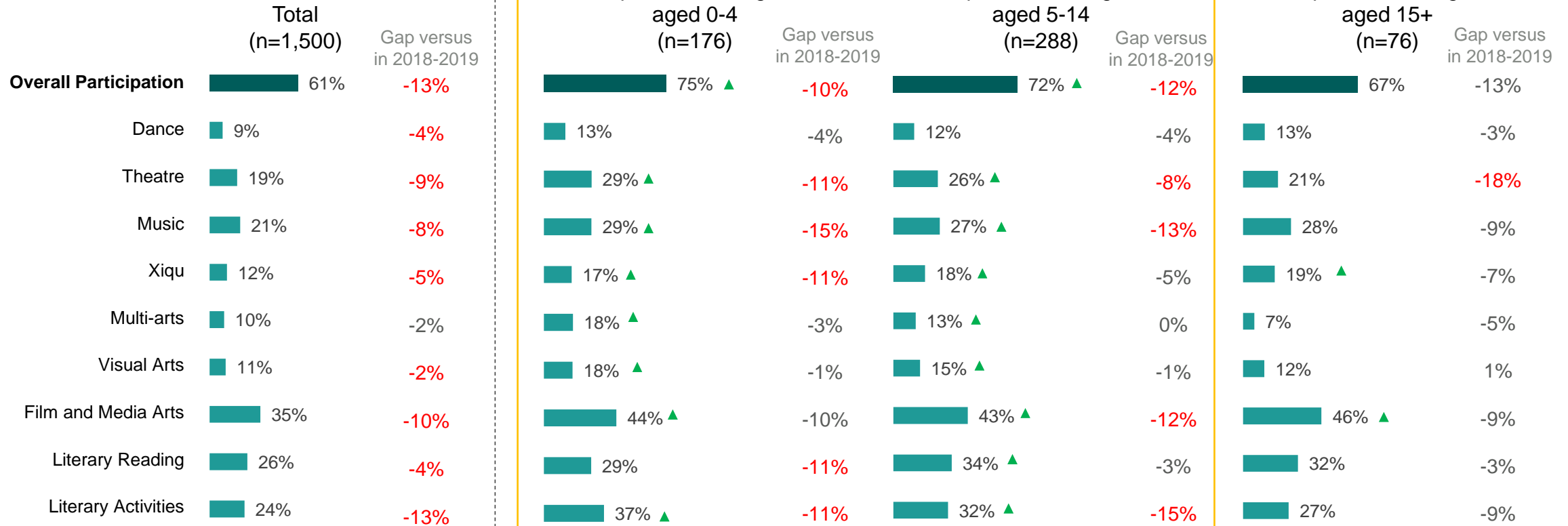
▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total



# Arts participation over time – by life segments

- Married persons having children aged below 14 years old or below participated more in almost every art form than the general public; perhaps they cultivated their children’s interest and appreciation in arts by participating with them.

**During COVID-19**  
(Jan 2020 – Jan 2021)



Base: All respondents, n=1,500

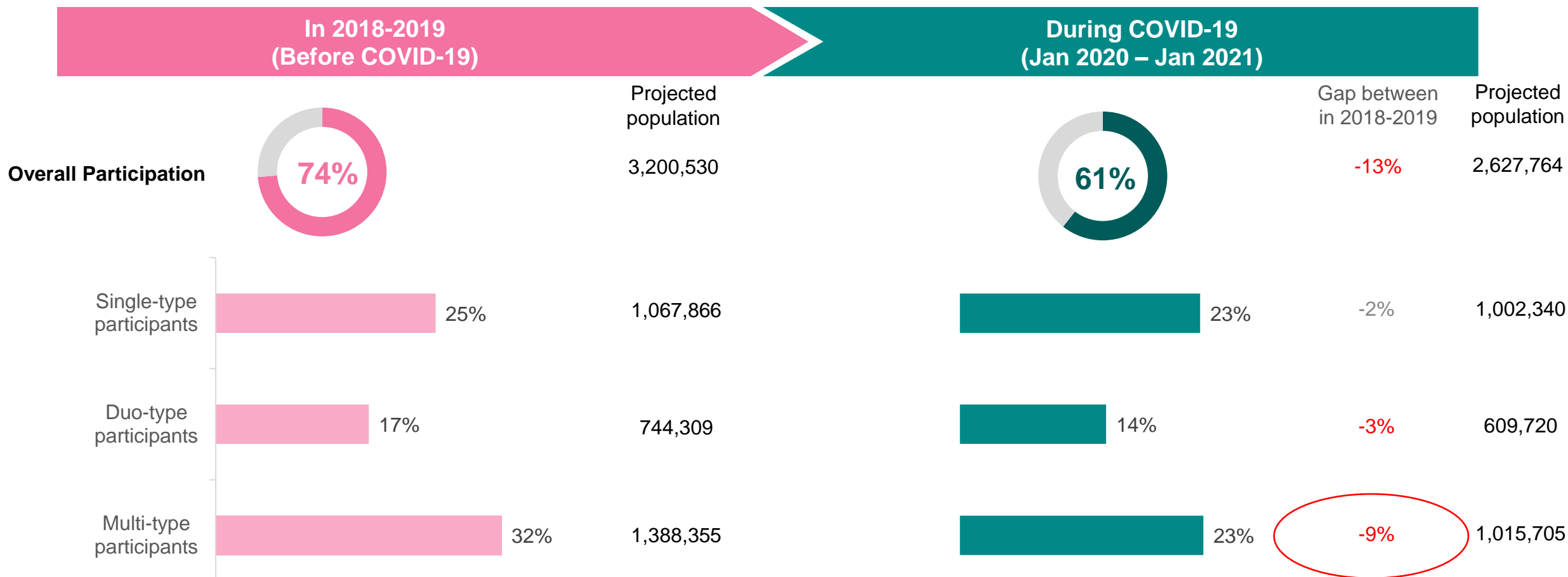
Gap in Green/ Red denotes significance based on 95% confident level compared to previous period

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

# Arts participation – single, duo vs. multi-types#

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

- Due to the impact of COVID-19, there was significant decrease in multi-type participants, while the proportion of single-type participants dropped slightly to 23%.



# Single-type participants – only participating in 1 art form  
 Duo-type participants – participating in 2 arts forms (Caveat: Literary Reading and Literary Activities are treated as the same type here)  
 Multi-type participants – participating in 3 or more types of art forms (Caveat: Literary Reading and Literary Activities are treated as the same type here)



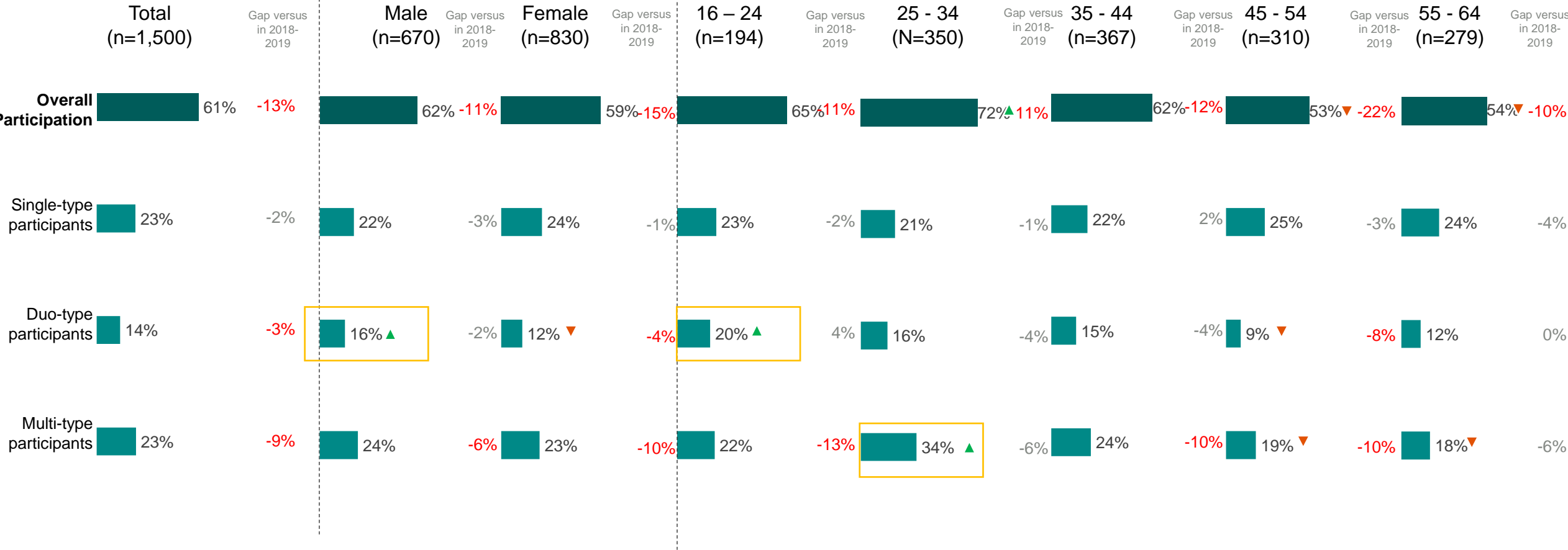
Base: All respondents, n=1,500

Gap in Green/ Red denotes significance based on 95% confident level compared to previous period

# Arts participation over time – by demographics

- Men and younger age group (aged 16-24) were more likely to participate in two different art forms during COVID-19, while larger proportion of people aged 25-34 participated in three or more art forms.

**During COVID-19**  
(Jan 2020 – Jan 2021)



Base: All respondents, n=1,500

Gap in Green/ Red denotes significance based on 95% confident level compared to previous period

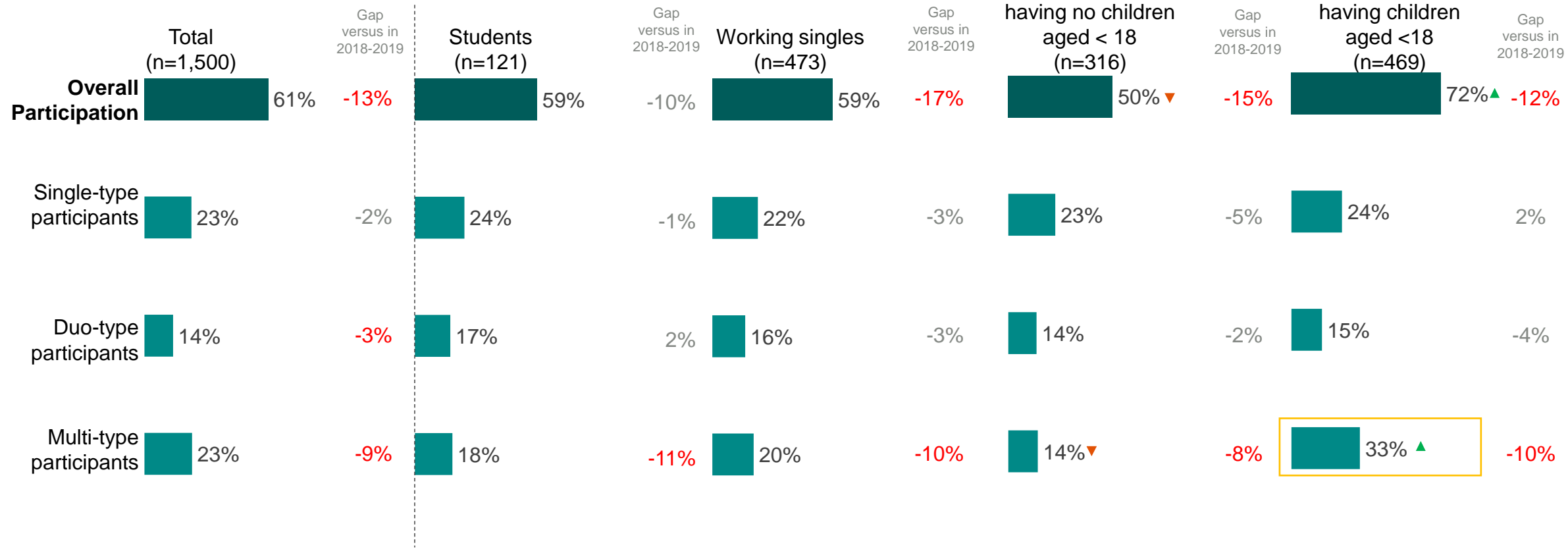
▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

# Arts participation over time – 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 arts participants during COVID-19, but they were also more diversified in their participation - likely to take part in three or more different art forms.

**During COVID-19  
(Jan 2020 – Jan 2021)**

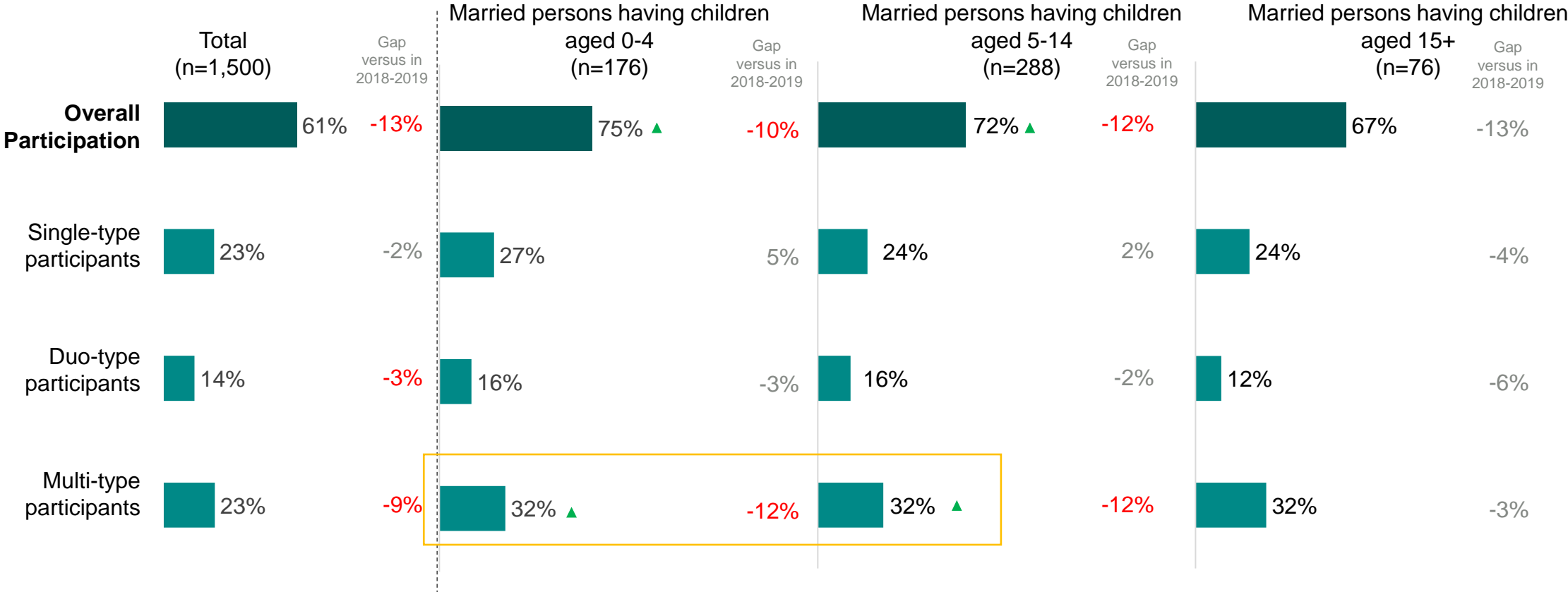


Base: All respondents, n=1,500  
 Gap in Green/ Red denotes significance based on 95% confident level compared to previous period  
 ▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

# Arts participation over time – by life segments

- In line with their higher participation incidence, married persons having children aged 14 years old or below were also more diversified in arts participation.

**During COVID-19  
(Jan 2020 – Jan 2021)**




Base: All respondents, n=1,500  
 Gap in Green/ Red denotes significance based on 95% confident level compared to previous period  
 ▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

# Segment of arts participation - definition

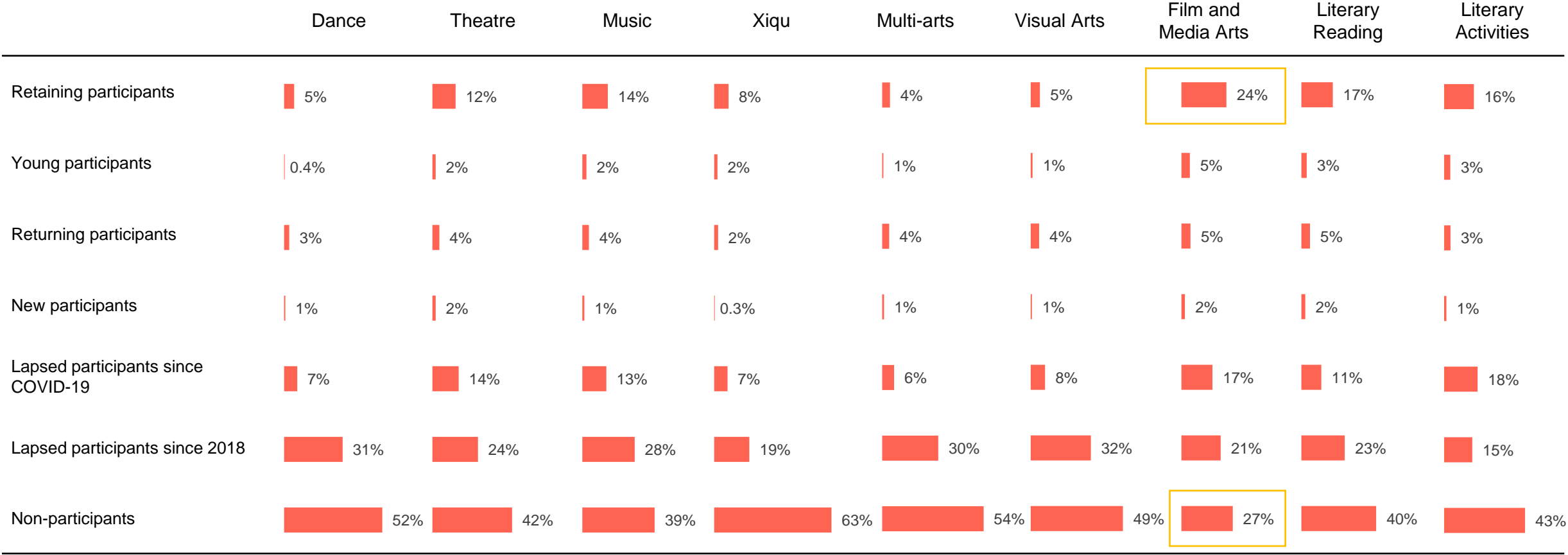
Based on their participation history, arts participants could be grouped into different segments to provide further insight on the impact of COVID-19 on the participation in different art forms:

- 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			

# Segment distribution by art form

- Film and Media Arts had a relatively higher retention compared with other art forms – 1 in 4 people were retaining participants. This art form also had the lowest percentage of non-participants than the others.
- During COVID-19, small proportions of people picked up arts participation (i.e. returning/ new participants). However, in all art forms, comparatively more participants had lapsed since the COVID-19 outbreak, which resulted in the drop in arts participants in general.



# Profiles of returning and new participants

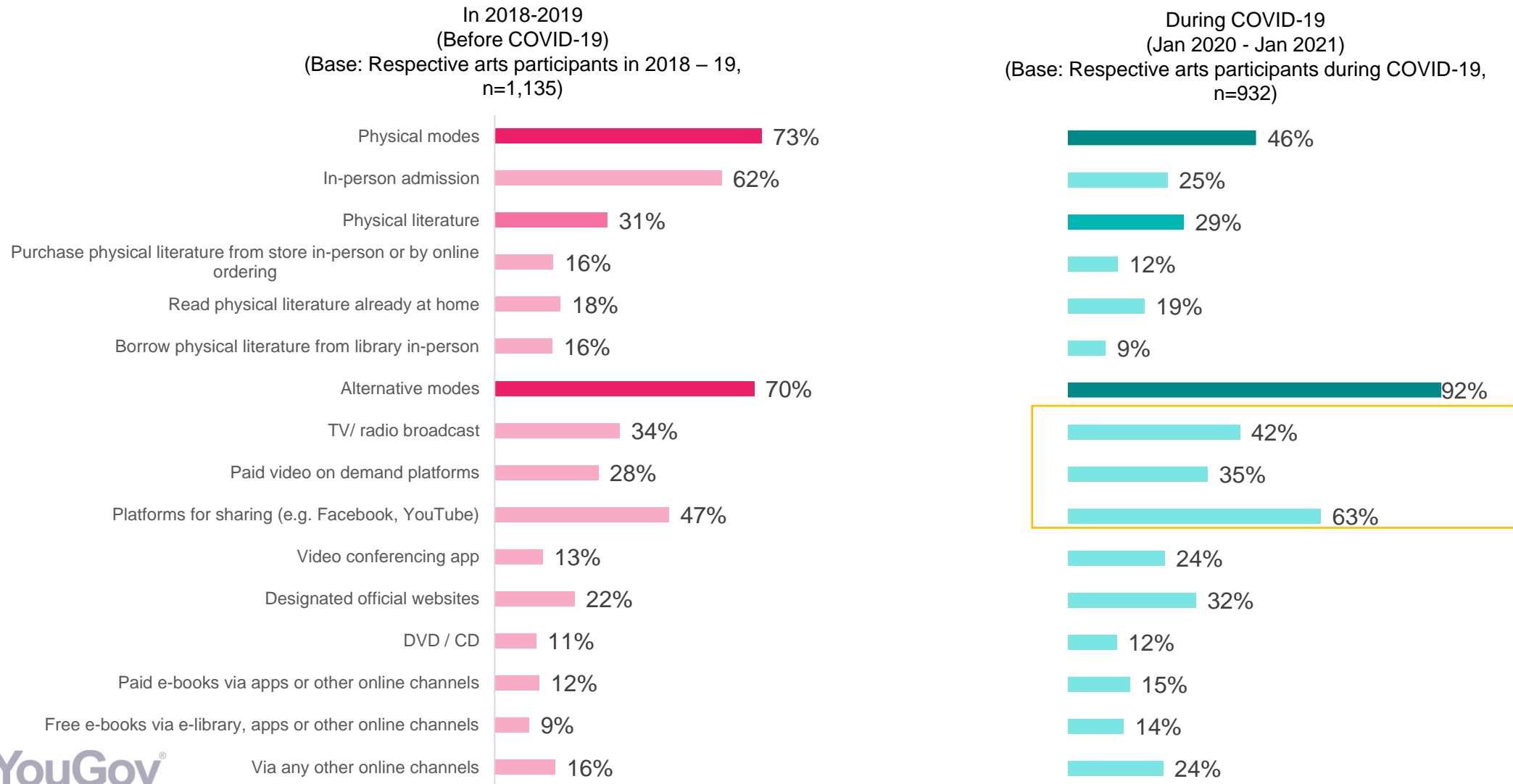
- Aggregating all art forms, there was close to 30% of returning and new participants who were aged 25-34. Students also constituted a considerable portion of new participants (15%), whereas 40% of returning participants were married and had children under 18.

	Total (n=1,500)	New participants (any art form)^ (n=138)	Returning participants (any art form)^ (n=361)
<b>Gender</b>			
Male	44%	40%	46%
Female	56%	60%	54%
<b>Age Group</b>			
16-24	13%	18% ▲	11%
25-34	20%	27% ▲	30% ▲
35-44	22%	20%	26%
45-54	22%	12% ▼	17% ▼
55-64	23%	23%	17% ▼
<b>Life segment</b>			
Students	9%	15% ▲	7%
Working singles	22%	22%	24%
Married persons having no children aged <18	24%	25%	17% ▼
Married persons having children aged <18	32%	21% ▼	40% ▲
Married persons having children aged 0 – 4	12%	13%	16% ▲
Married persons having children aged 5 – 14	19%	10% ▼	24% ▲
Married persons having children aged 15 - 17	6%	2%	4%
Retirees	3%	3%	2%



# Mode of participation among arts participants

- Among those who participated, alternative modes became considerably more popular during COVID-19 than in 2018-2019 (growing from 70% to 92%), whereas the rate of participation in physical modes plunged from 73% to 46%.
- Participation via sharing platforms, TV/ radio broadcast and paid video on demand platforms were the most popular modes during COVID-19.

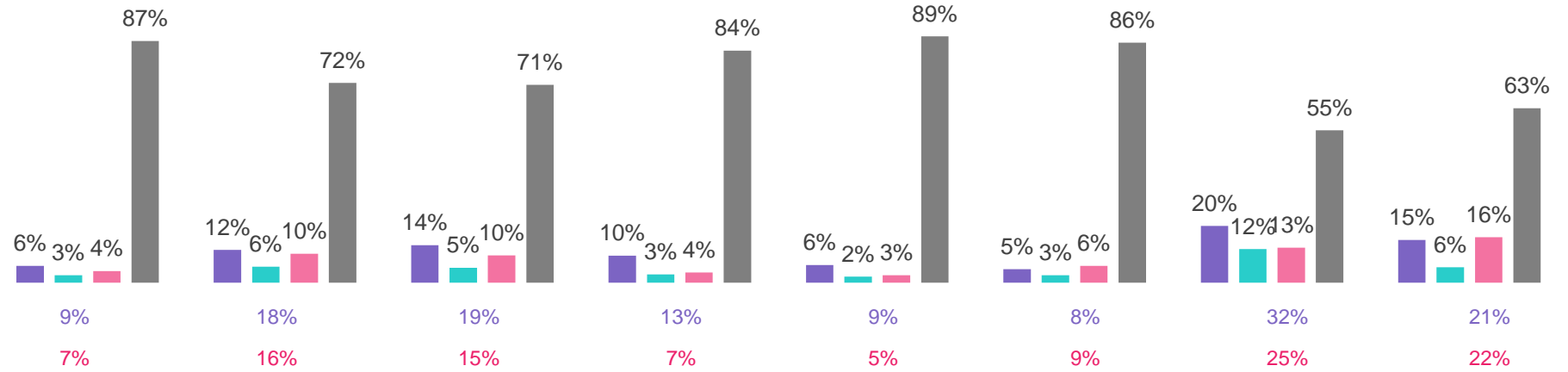


# Arts participation before and during COVID-19

- Looking at individual art forms however, while arts participation in physical modes dropped for all art forms during COVID-19, participation in alternative modes remained largely the same.
- In other words, there were more previous physical-mode participants who had lapsed since COVID-19 than participants adopting alternative modes in the respective art form during the epidemic.

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

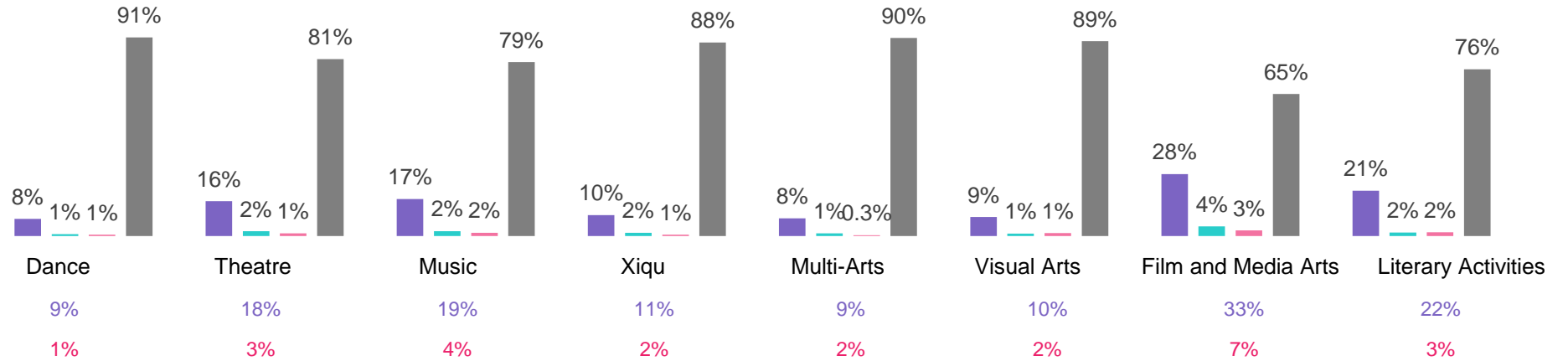
In 2018-2019  
 (Before COVID-19)



Any Alternative mode

Any Physical mode

During COVID-19  
 (Jan 2020 – Jan 2021)



Any Alternative mode

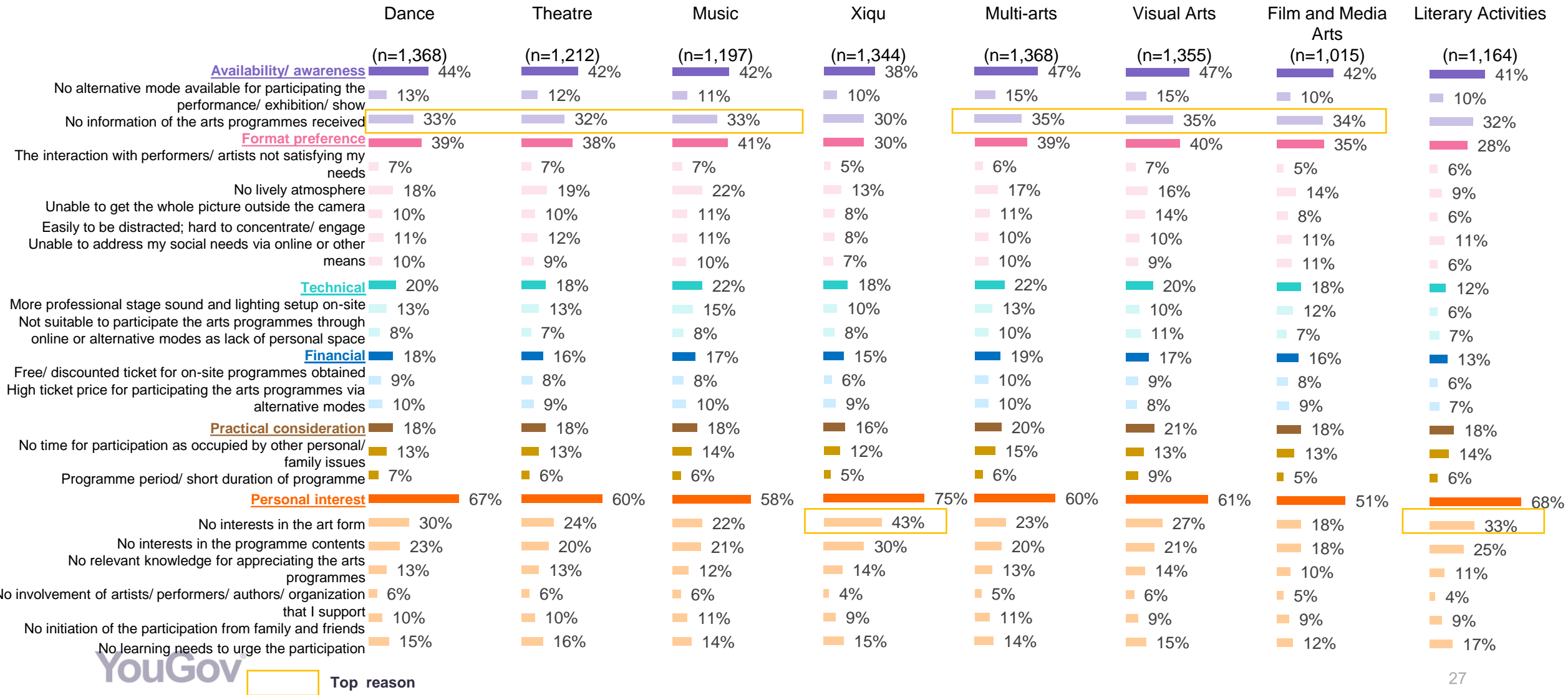
Any Physical mode



Base: All respondents, n= 1,500

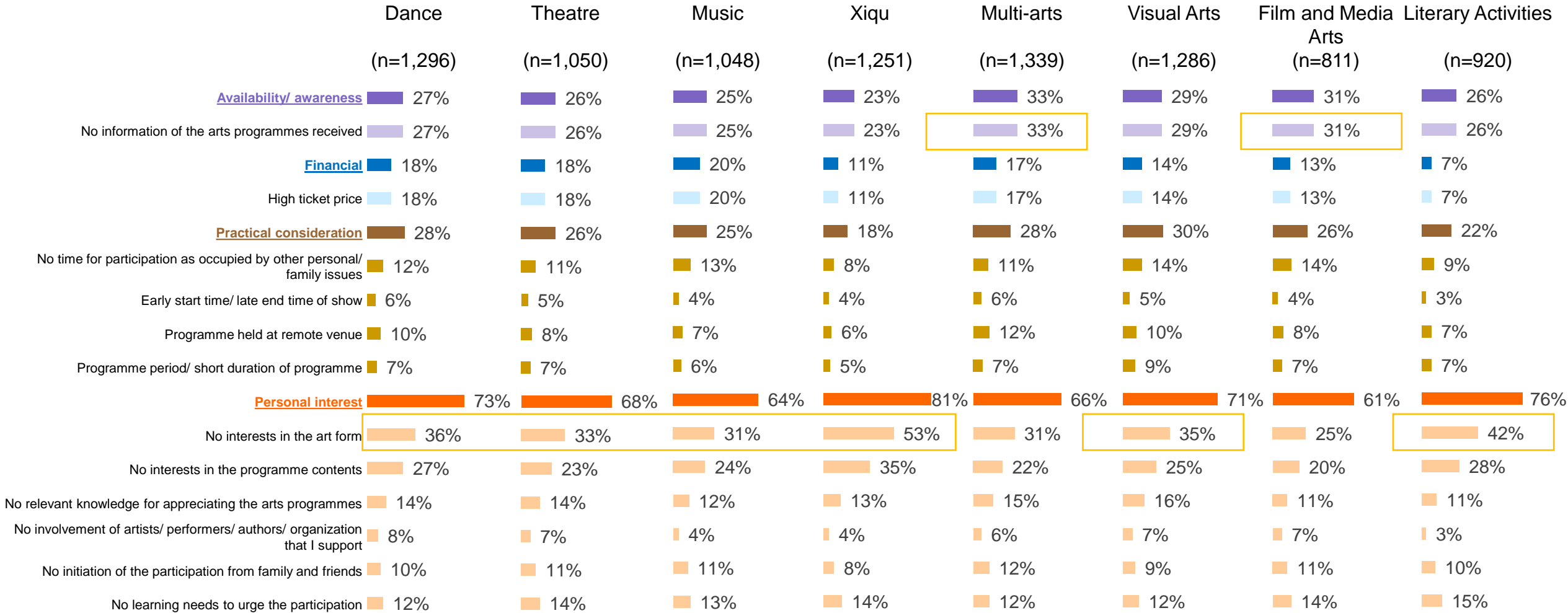
# Reasons for not participating in arts programmes via alternative modes during COVID-19

- In most art forms, a key barrier to alternative-mode participation during COVID-19 was the lack of information of arts programmes. Exceptions were Xiqu and Literary Activities where the lack of interest in the art form was the top reason for non-participation.



# Reasons for not participating in arts programmes in 2018-2019

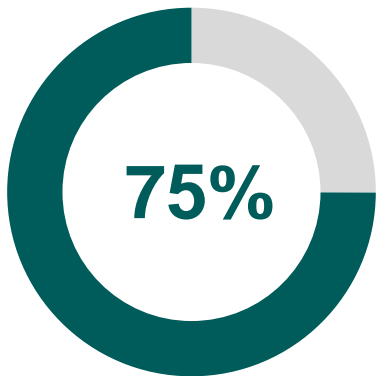
- By comparison, in 2018-2019, lack of interest in the art form was a more dominant reason for non-participation in either physical or alternative modes in most art forms except Multi-arts and Film and Media Arts.



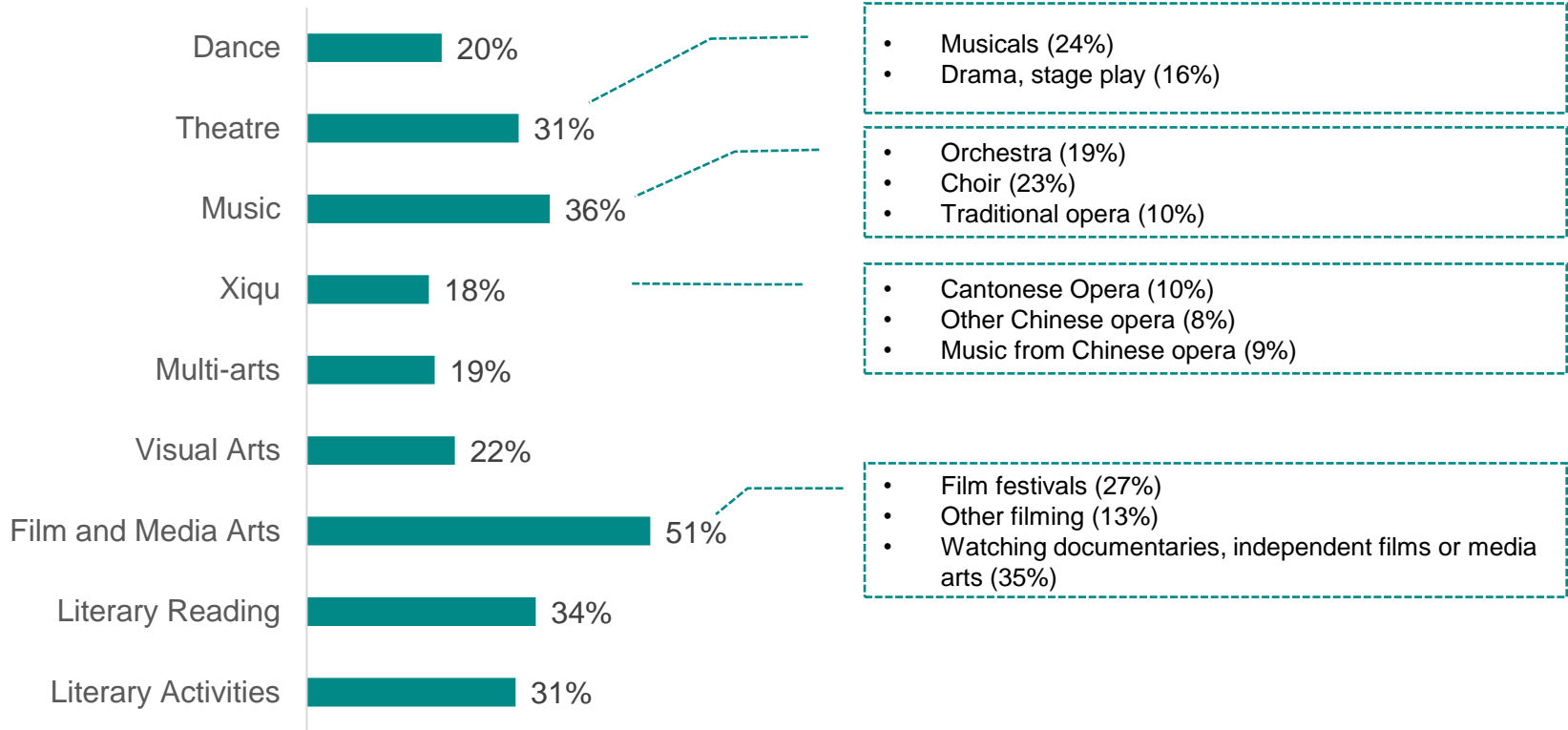
# Awareness of arts appreciation in alternative modes during COVID-19

- During COVID-19, although 3 out of 4 people were aware of arts programmes in alternative modes in at least one art form, the awareness level was considerably lower when looking at individual art forms, with the highest for Film and Media Arts (51%), and the lowest for Xiqu (18%), Multi-arts (19%) and Dance (20%).

Overall Awareness

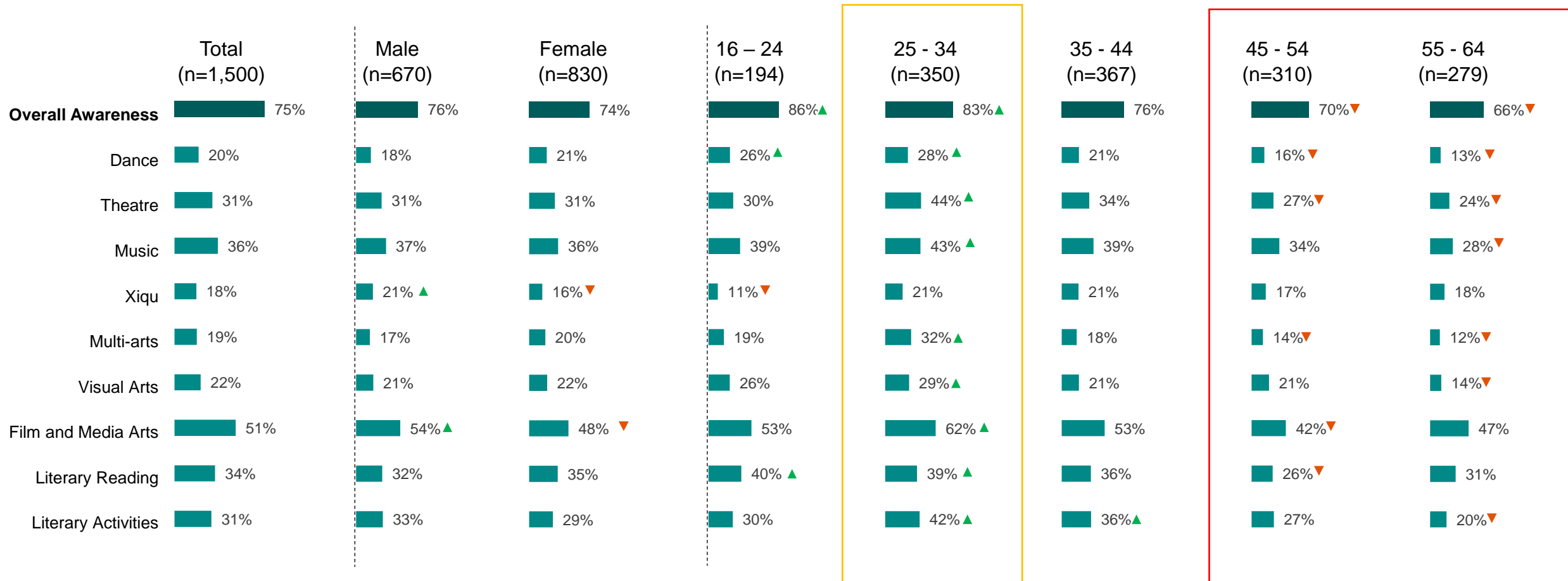


Projected Population 3,252,031



# Awareness of arts appreciation in alternative modes during COVID-19 – by demographics

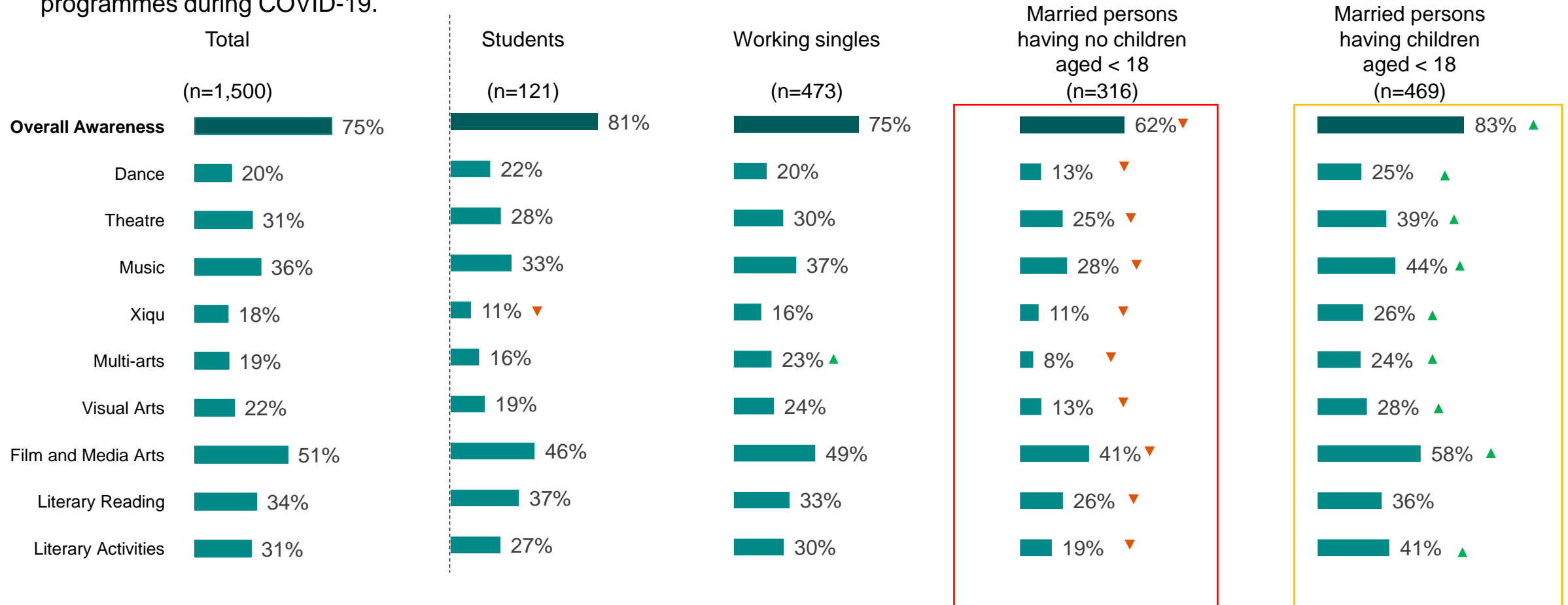
- The awareness of alternative-mode programmes was higher for people aged 25-34 for most art forms which was in line with their higher participation rate during COVID-19.
- Awareness levels for older age groups (aged 45-54 and 55-64) were generally lower.



# Awareness of arts appreciation in alternative modes during COVID-19 – by life segments

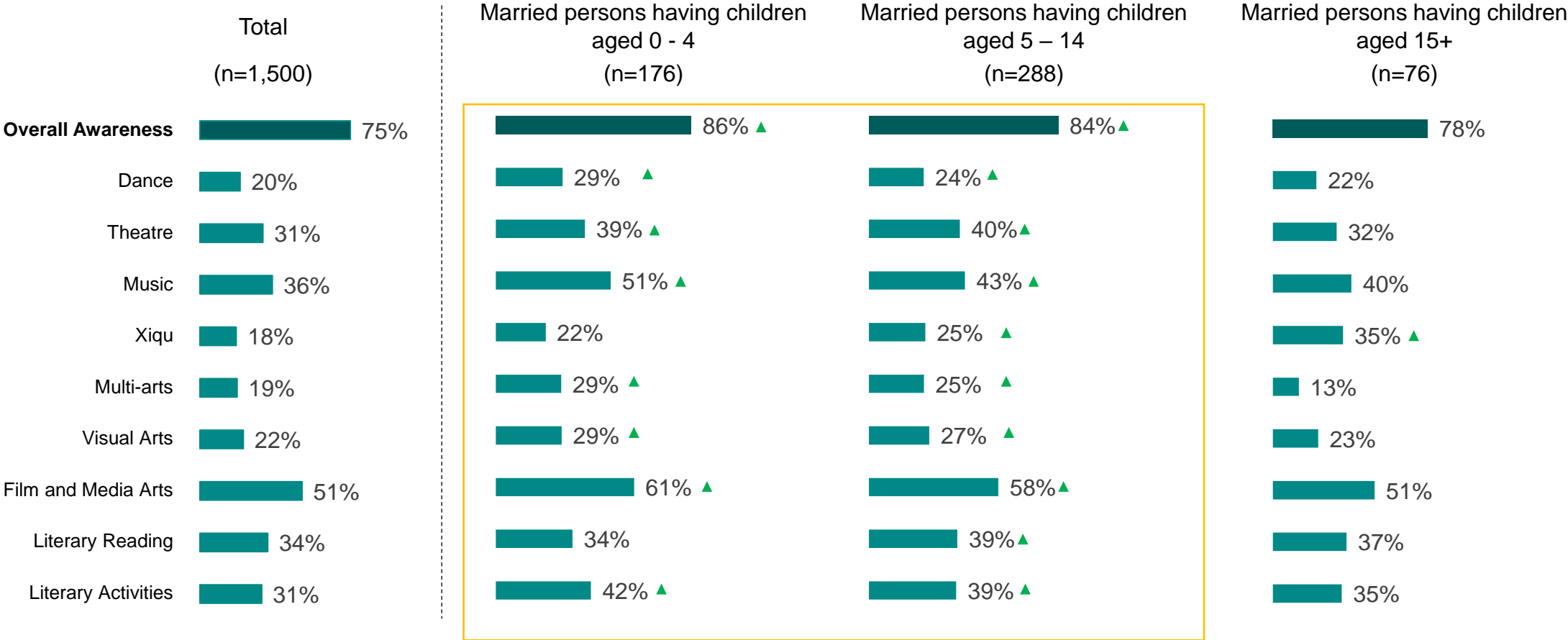
Note to readers: The segment of retirees is not shown due to small base (n=26)

- Awareness level for married persons having no children under the age of 18 was lower than total possibly due to the large portion of older people in this segment.
- In line with their high participation incidence, married persons having children under the age of 18 had a higher awareness of alternative-mode programmes during COVID-19.



# Awareness of arts appreciation in alternative modes during COVID-19 – by life segments

- Married persons having children aged 14 years old or below were more aware of alternative-mode programmes in general.



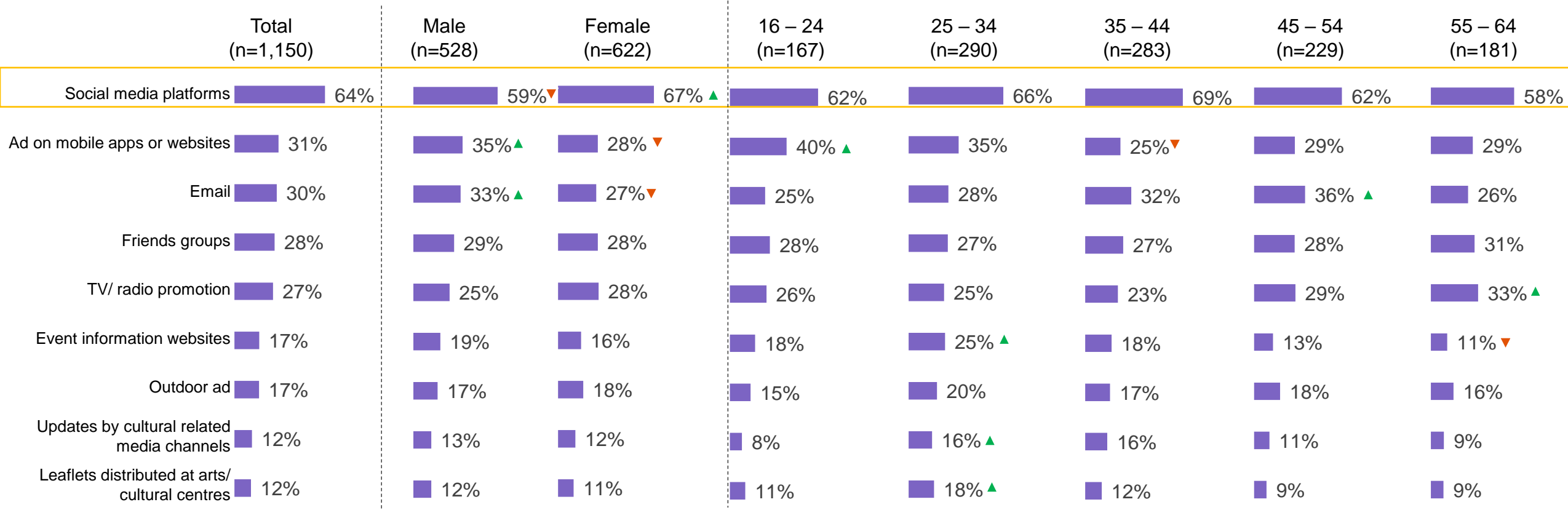
Base: All respondents, n=1,500

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



# Information source for arts programmes in alternative modes during COVID-19

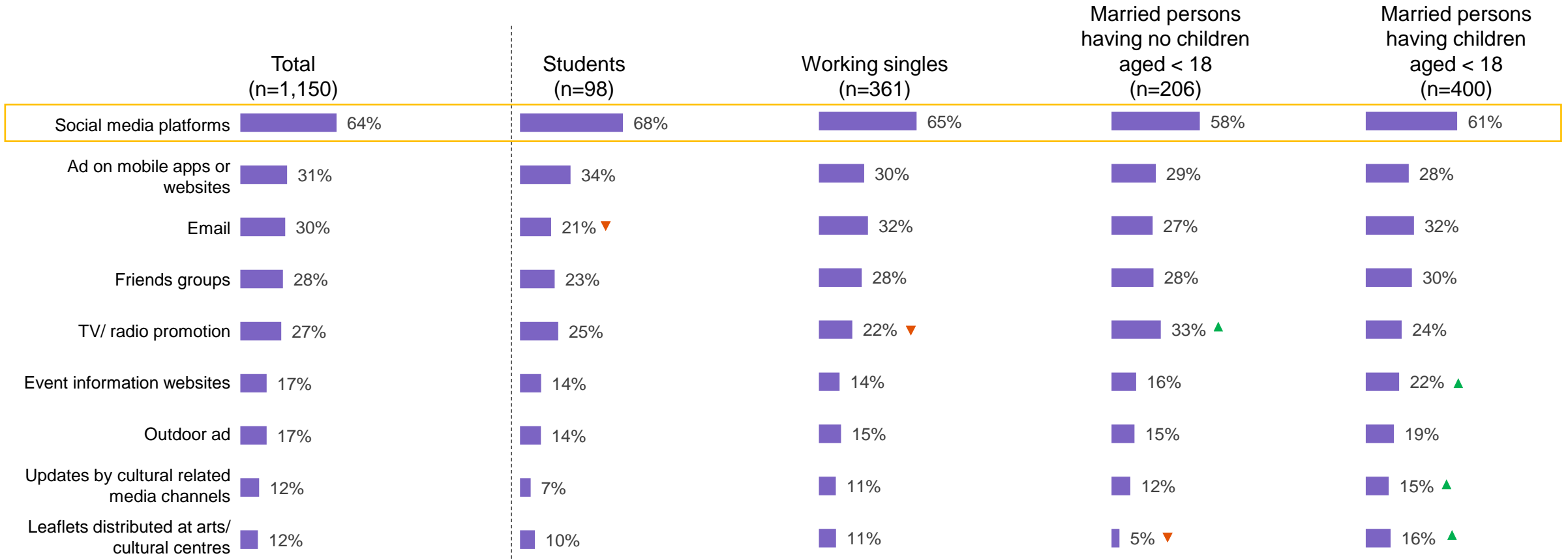
- Social media platforms (64%) were the main information channel for alternative-mode programmes for both male and female and across all age groups. Ads on mobile apps or websites were also effective in reaching male and young generation at age 16-24, whilst emails could reach better among those aged 45-54 and also male. People aged 55-64 relied more on TV/ radio promotion for information.



# Information source for arts programmes in alternative modes during COVID-19 – by life segments

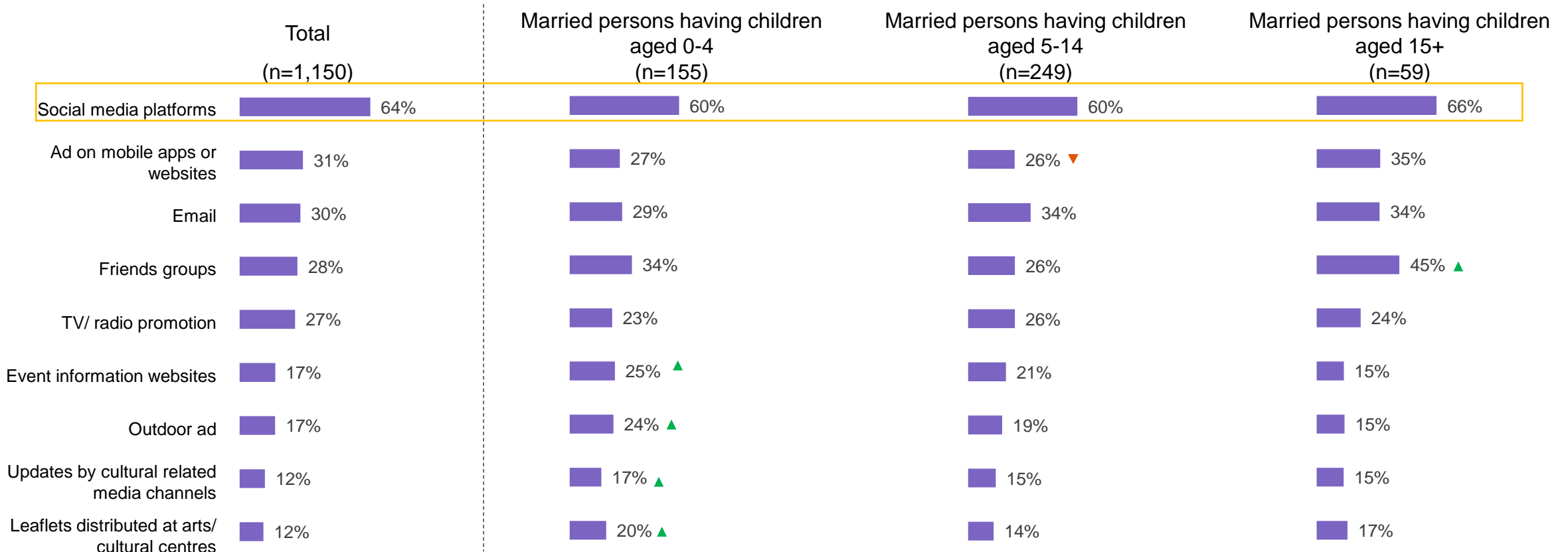
Note to readers: The segment of retirees is not shown due to small base (n=26)

- In line with the overall observation, social media platforms were the primary information source for all life segments.



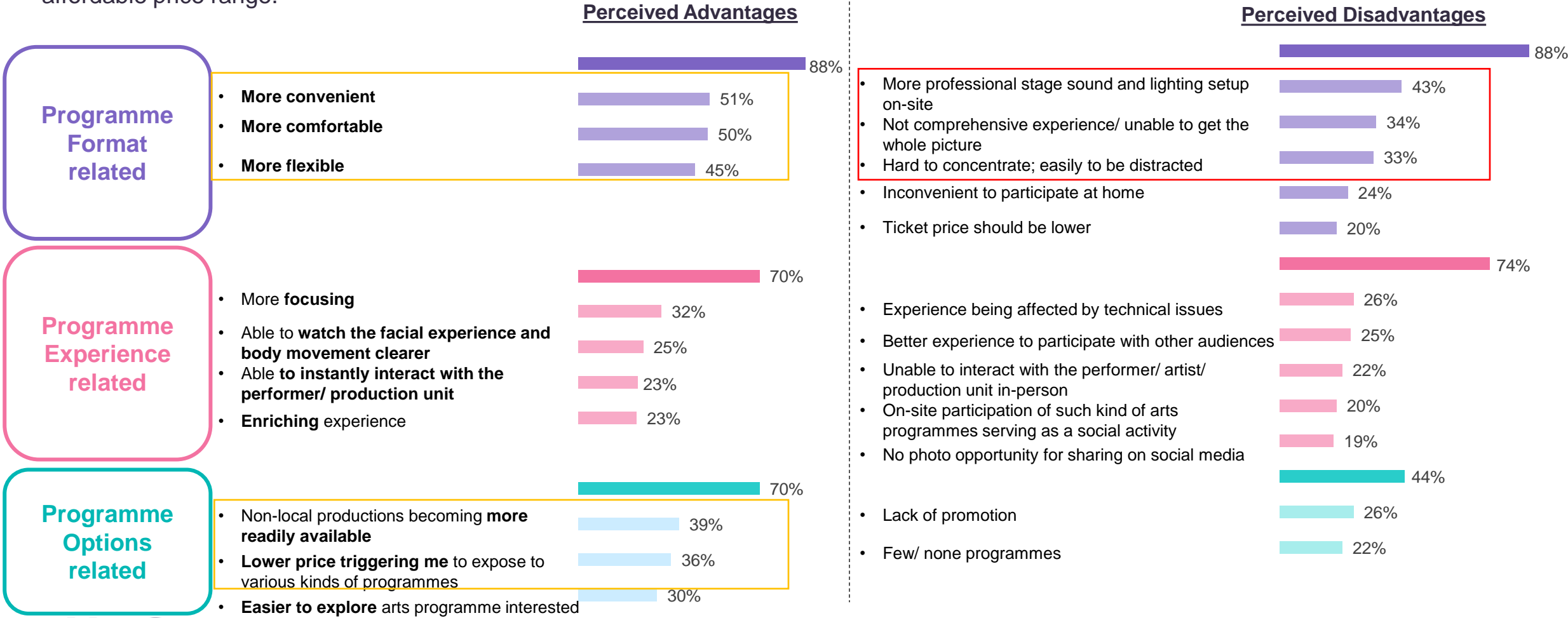
# Information source for arts programmes in alternative modes during COVID-19 – by life segments

- Social media platforms dominated as the main information channel for married persons having children at different ages.
- Married persons with younger children (aged 0-4) also sought information via event information websites, outdoor ads, leaflets distributed at arts/ cultural centres and cultural related media channels.
- Married persons having children aged 15+ relied more heavily on friends' groups for information.



# Perceived advantages and disadvantages of participating in alternative modes

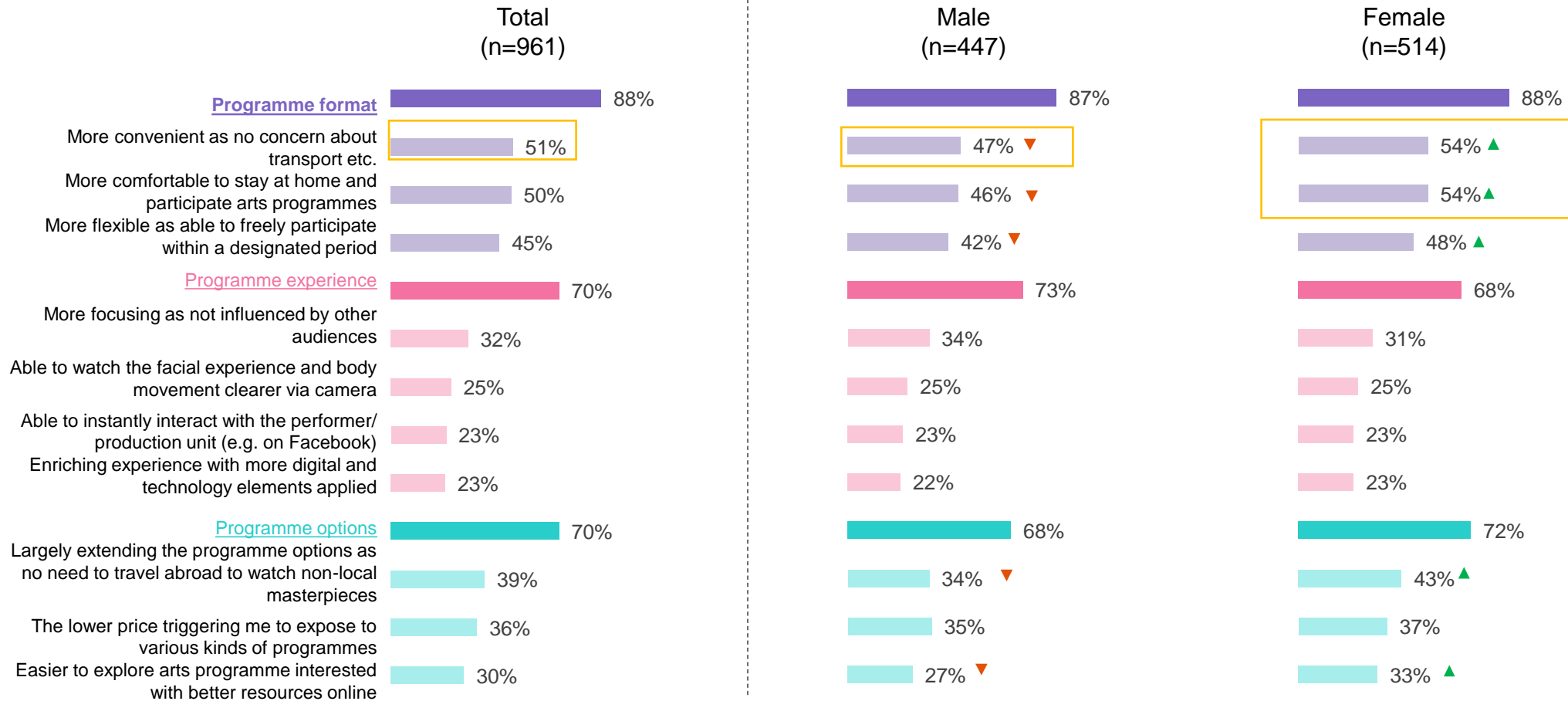
- Convenience, comfortability and flexibility were found to be the biggest advantages of alternative modes across both gender and most life segments; whereas the less professional stage sound and light setup, incomprehensive experience and difficulty to concentrate were generally seen as the major drawbacks.
- Over one third of respondents also opined that alternative modes provided more programme options in terms of geographical reach and affordable price range.



Base: Those who have ever participated in arts programmes via alternative modes, n=961

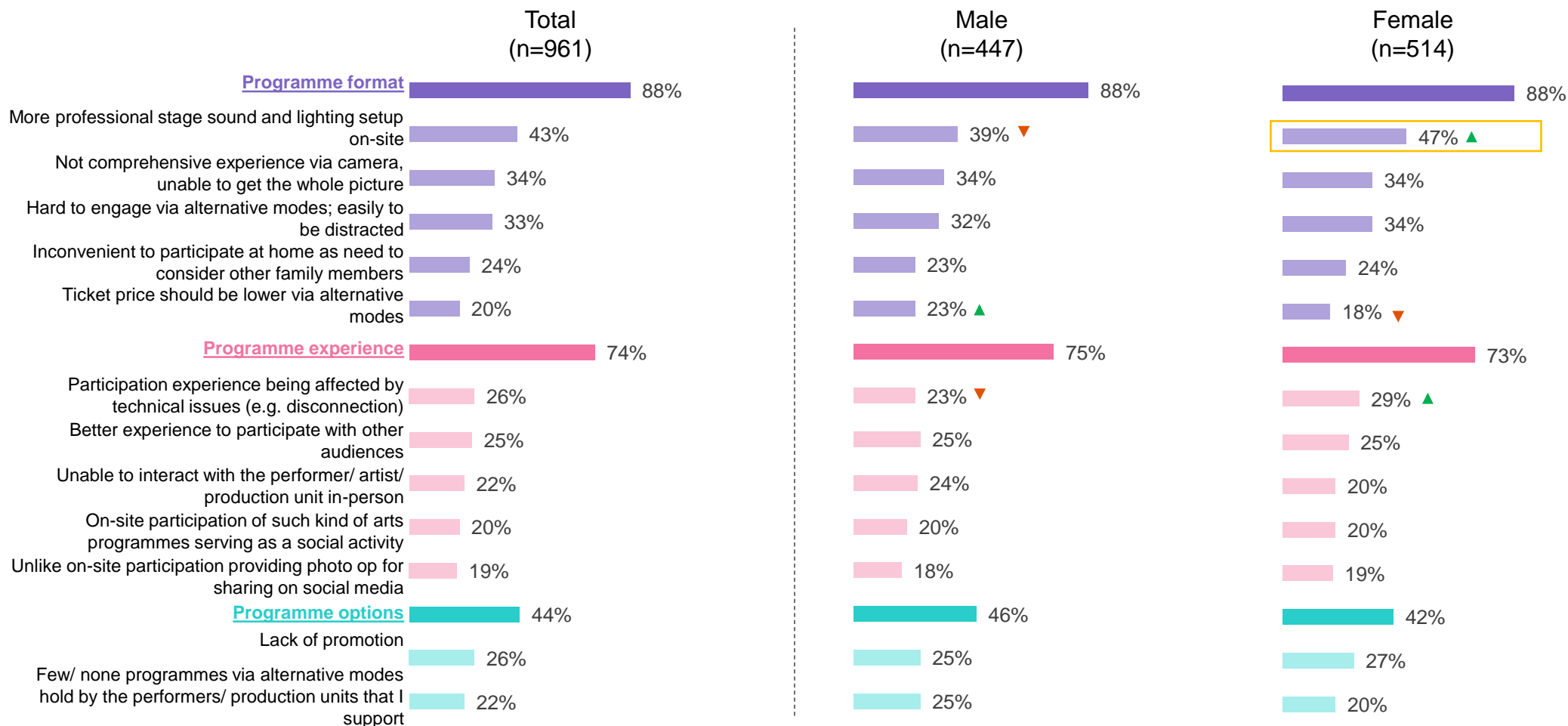
# Perceived advantages of participating in alternative modes – by gender

- Female were in particular more appreciative of the convenience, comfort and flexibility of alternative-mode programmes and they also acknowledged the benefit of easily watching non-local masterpieces via alternative modes.



# Perceived disadvantages of participating in alternative modes – by gender

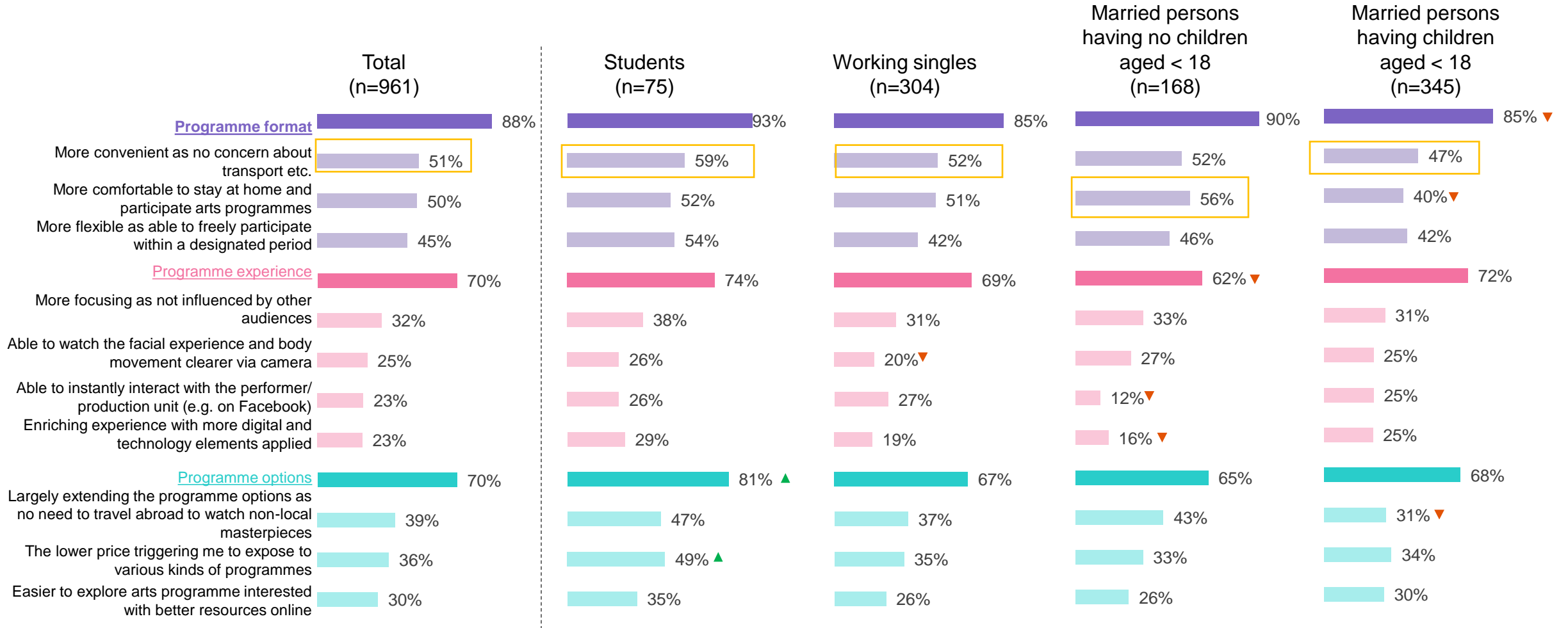
- Female were more concerned with the lack of professional stage sound and lighting setup, as well as technical issues such as network disruption. Male on the other hand were comparatively more concerned on ticket price and suggested that the price should be lower in alternative modes.



# Perceived advantages of participating in alternative modes – by life segments

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

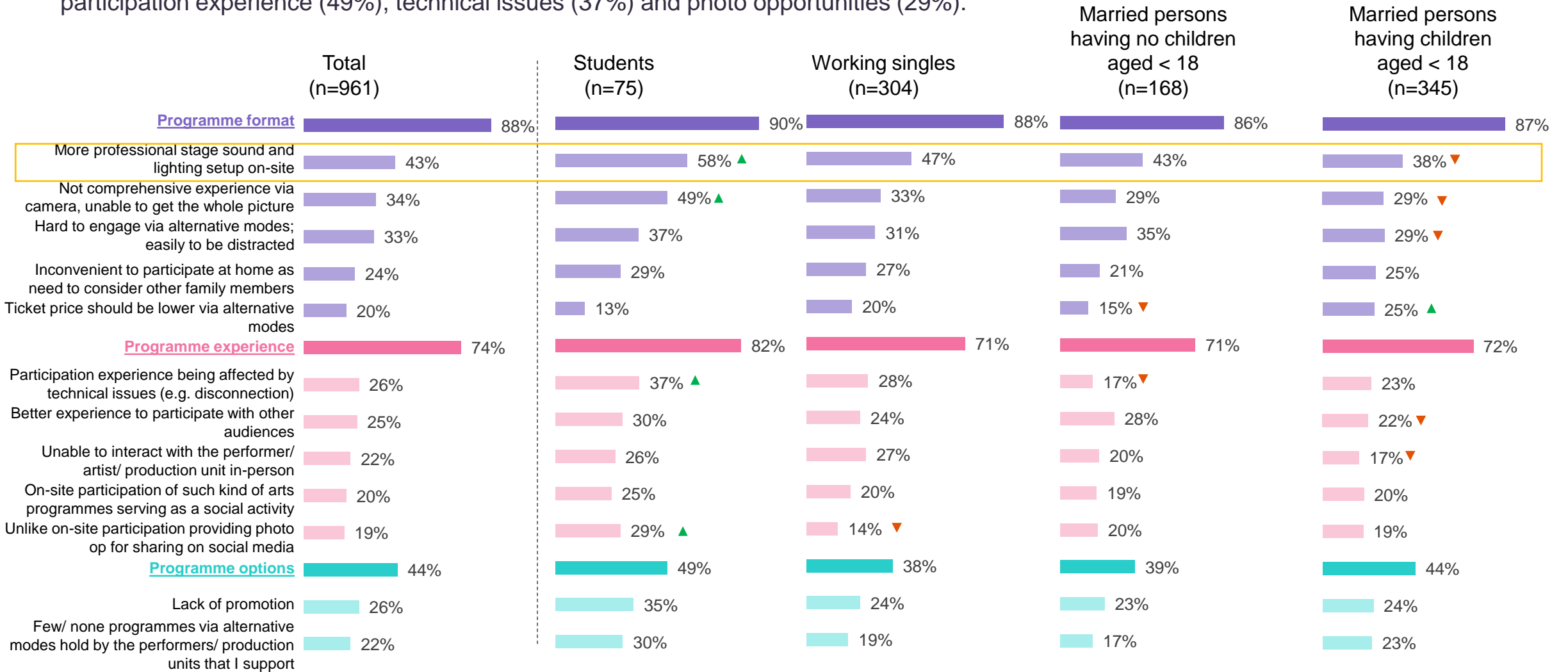
- Compared to other life segments, students were more attracted to the lower price offered by alternative-mode programmes (49%).



# Perceived disadvantages of participating in alternative modes – by life segments

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

- But students were also more concerned with the lack of professional stage sound and lighting setup (58%), comprehensiveness of participation experience (49%), technical issues (37%) and photo opportunities (29%).



**YouGov** Top factor

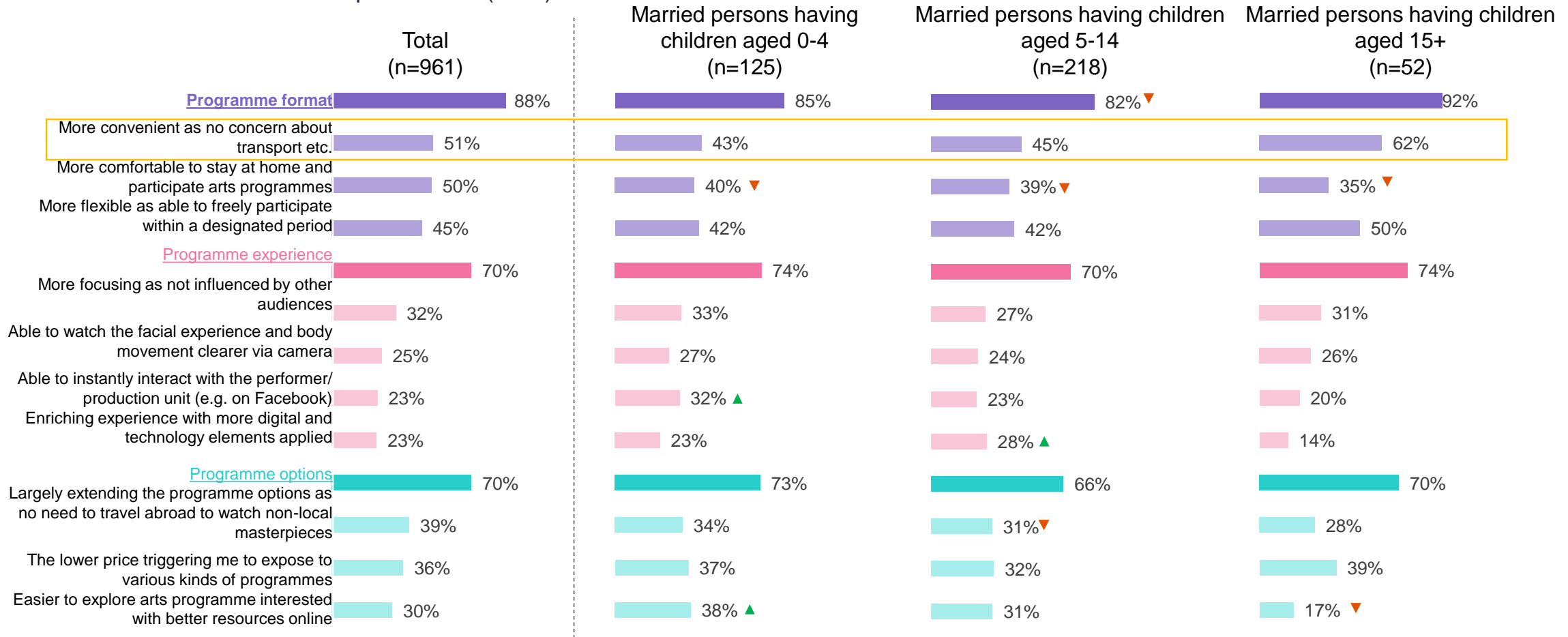
Base: Those who have ever participated in arts programmes via alternative modes, n=961

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



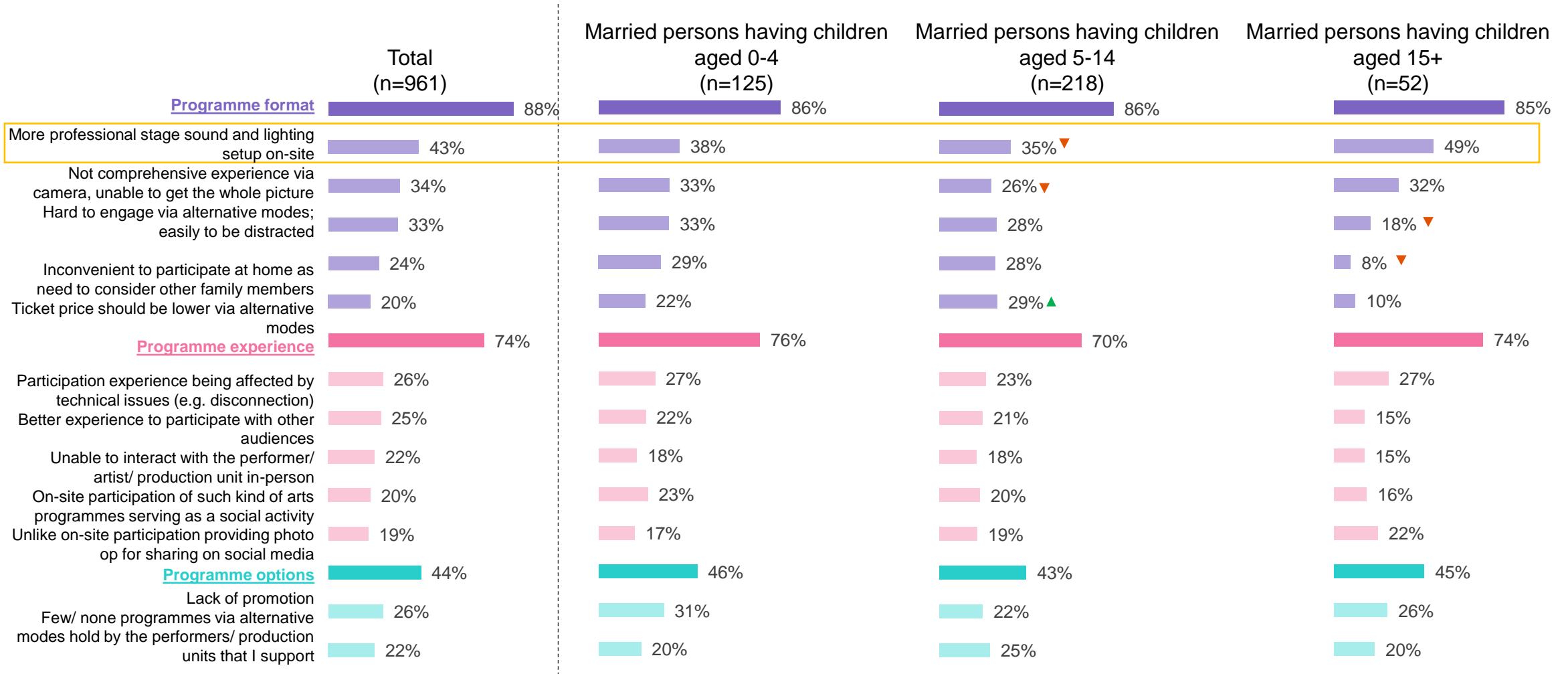
# Perceived advantages of participating in alternative modes – by life segments

- Unlike in other life segments, a relatively lower percentage of married persons having young children aged 14 or below acknowledged the comfort of participating in arts programmes at home.
- Married persons having children aged 0-4 were appreciative of the ease of exploring arts programmes with better resources online (38%) and instant interaction with the performers (32%).



# Perceived disadvantages of participating in alternative modes – by life segments

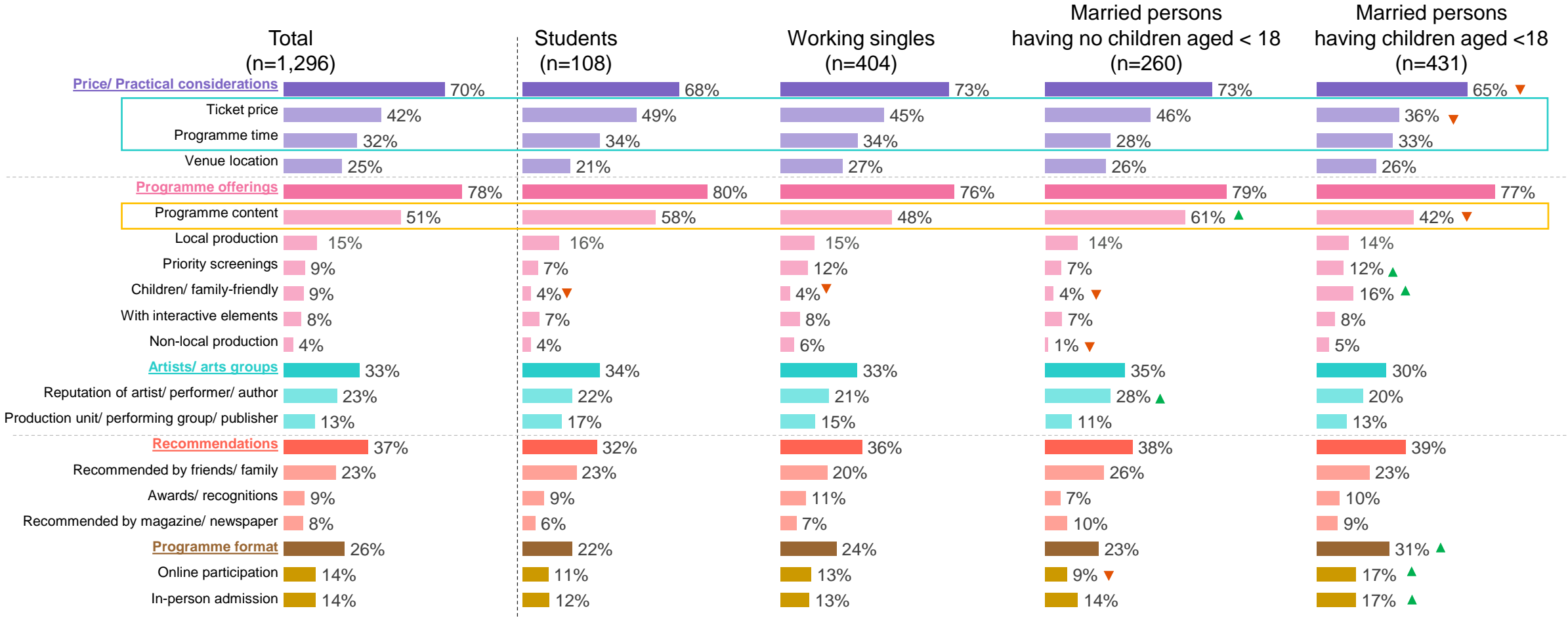
- Married persons having children aged 5-14 were in particular more concerned about the ticket price of alternative-mode programmes.



# Key consideration for arts participation

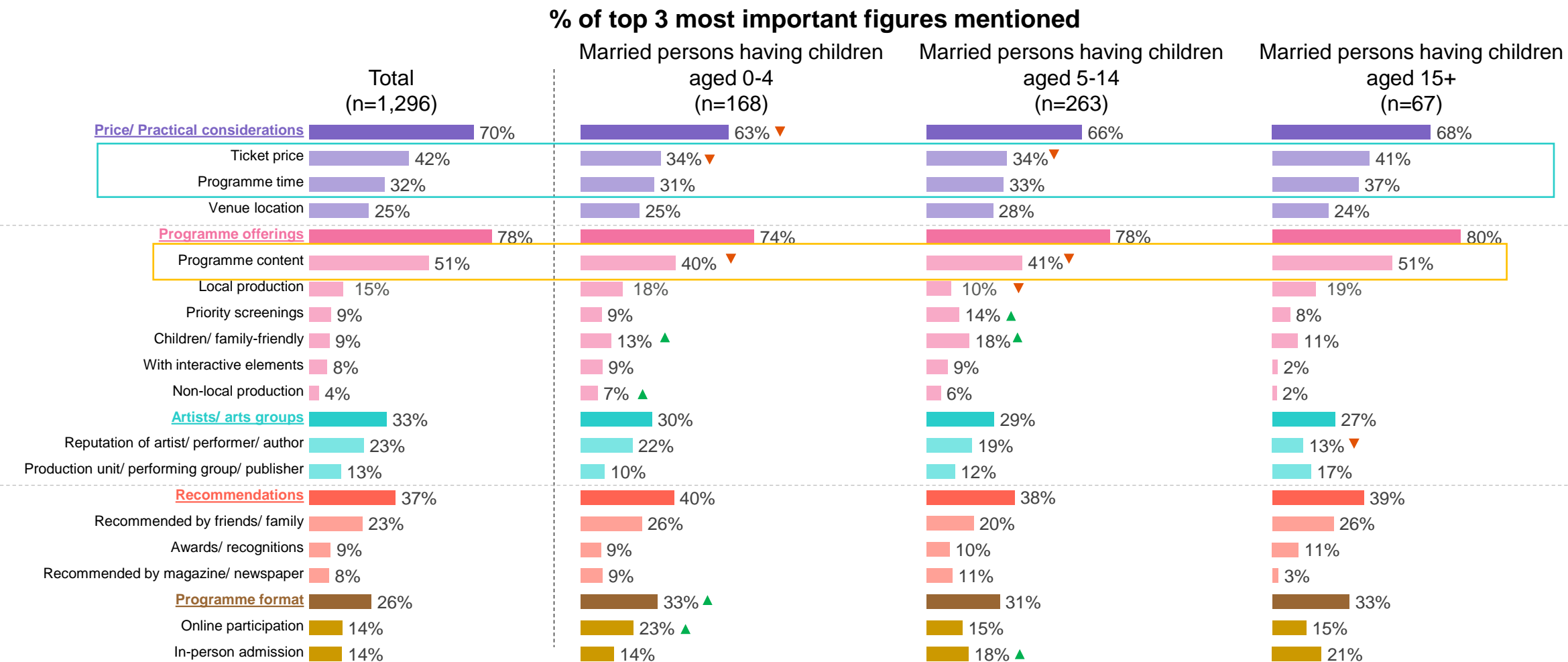
- Programme content, price and time were the key factors in considering arts participation across all life segments.

## % of top 3 most important figures mentioned



# Key consideration for arts participation

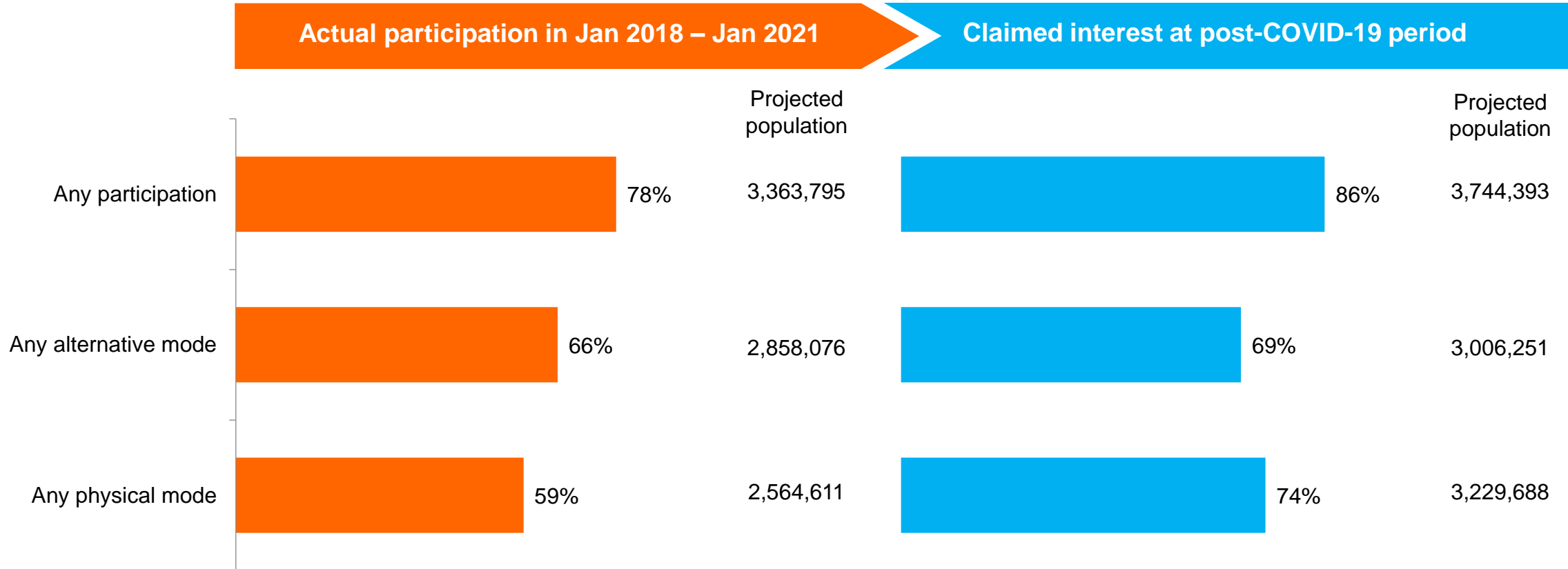
- Married persons having children aged 14 or below put more attention on children/ family-friendly elements than those with older children, possibly because these parents were more likely to participate in arts programmes with their young children.



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

Note to readers: Participation in Jan 2018 – Jan 2021 denotes participation in either 2018-2019 or during COVID-19

- Looking forward to the future when COVID-19 would be over, a high 86% of respondents expressed interest in arts participation – more than the actual net participation rate of 78% before and during COVID-19.
- Although there might be more physical-mode programmes available when COVID-19 would be over, there was a mild increase in claimed interest in alternative-mode programmes, compared to the actual participation in alternative modes before and during COVID-19.
- There would be a strong rebound on the interest in physical-mode programmes at post-COVID-19 period.



Base: All respondents, n=1,500

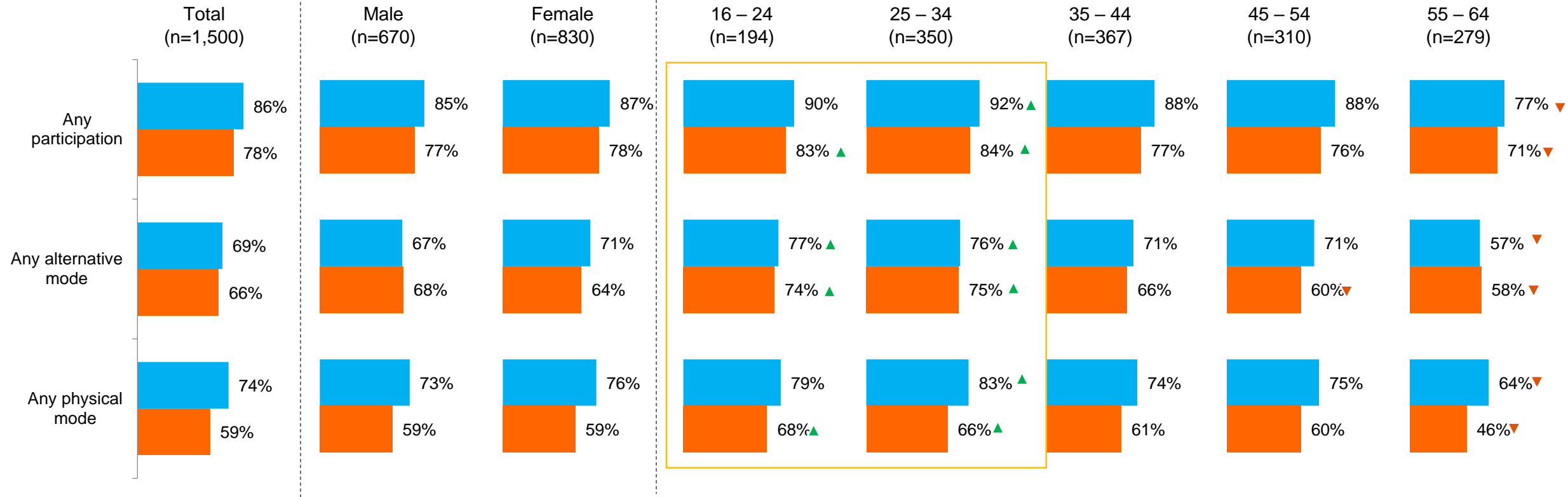
# Arts participation in Jan 2018 – Jan 2021 and claimed interest at post-COVID-19 period – by demographics

Note to readers: Participation in Jan 2018 – Jan 2021 denotes participation in either 2018-2019 or during COVID-19

- Higher arts participation at post-COVID-19 period, whether in physical or alternative modes, was comparatively seen among those aged 16-24 and 25-34.
- Both gender and all age groups expressed more interest in physical modes over alternative ones at post-COVID-19 period.

Claimed interest at post-COVID-19 period

Actual participation in Jan 2018 – Jan 2021



Base: All respondents, n=1,500

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

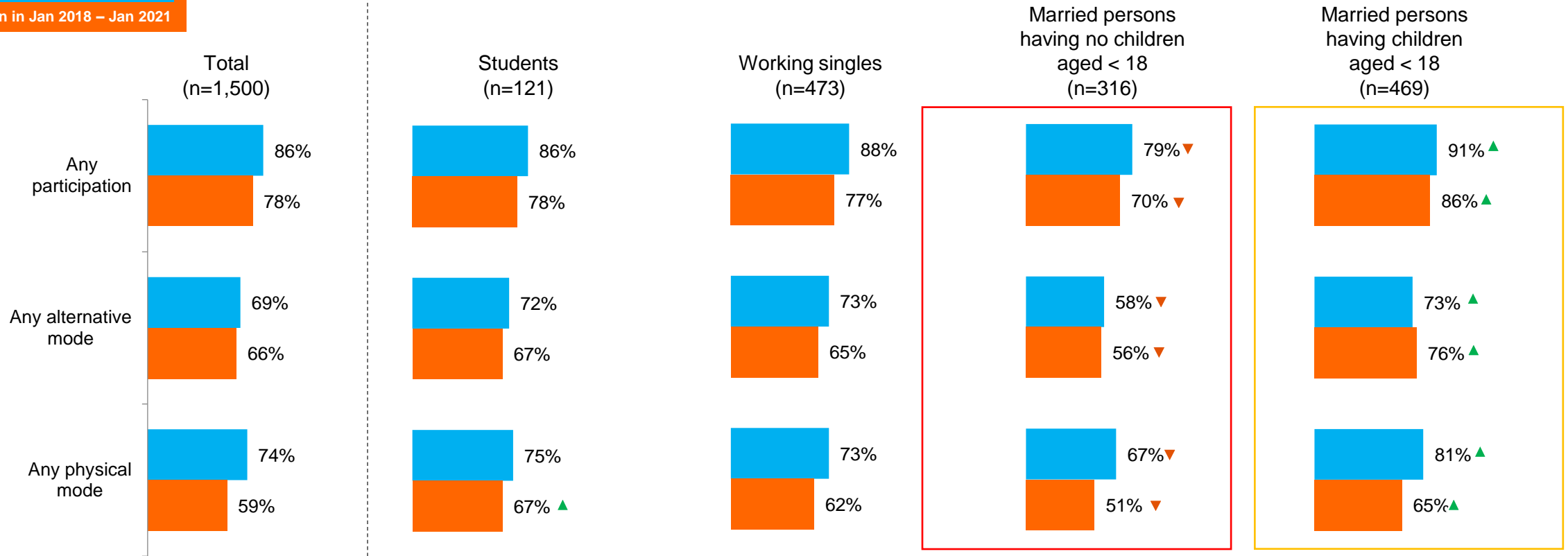
# Arts participation in Jan 2018 – Jan 2021 and claimed interest at post-COVID-19 period – by life segments

Note to readers: Participation in Jan 2018 – Jan 2021 denotes participation in either 2018-2019 or during COVID-19

- Married persons having children under 18 did not only participate more in Jan 2018 – Jan 2021, their claimed interest in both physical- and alternative-mode arts programmes at post-COVID-19 period was also stronger.
- On the contrary, the opposite was true for married persons having no children under the age of 18 – their actual past participation and claimed future interest were the lowest among all segments.

Claimed interest at post-COVID-19 period

Actual participation in Jan 2018 – Jan 2021



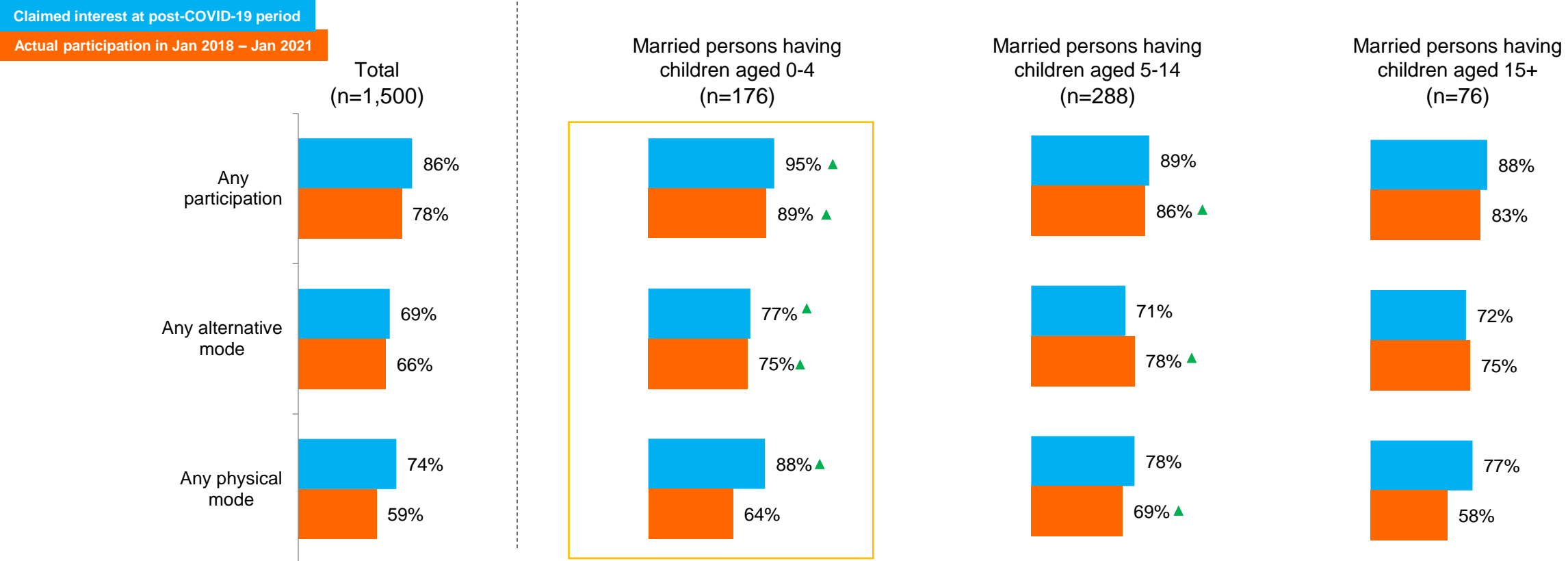
Base: All respondents, n=1,500

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

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

Note to readers: Participation in Jan 2018 – Jan 2021 denotes participation in either 2018-2019 or during COVID-19

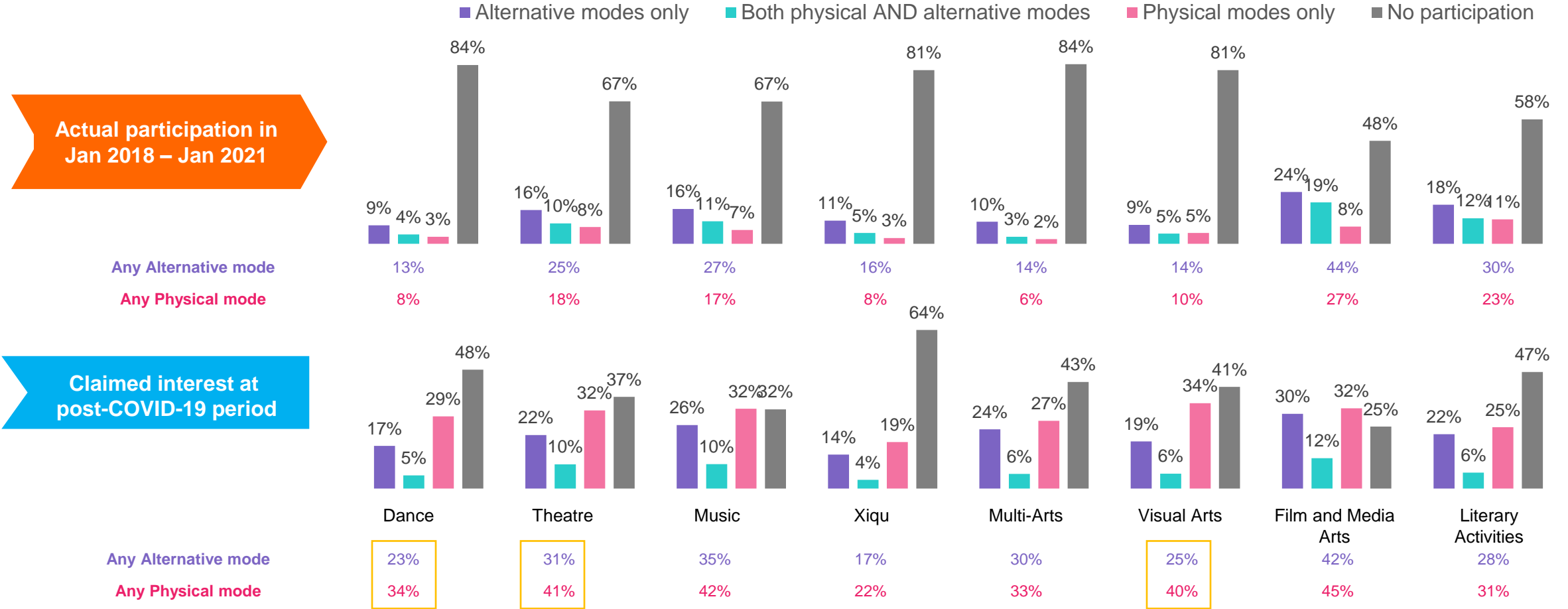
- By comparison, married persons having children aged 0-4 were more eager in arts participation in either physical or alternative modes.
- Married persons having children aged 5 or above had a lower interest in alternative-mode programmes at post-COVID-19 period than their actual participation in Jan 2018 – Jan 2021.





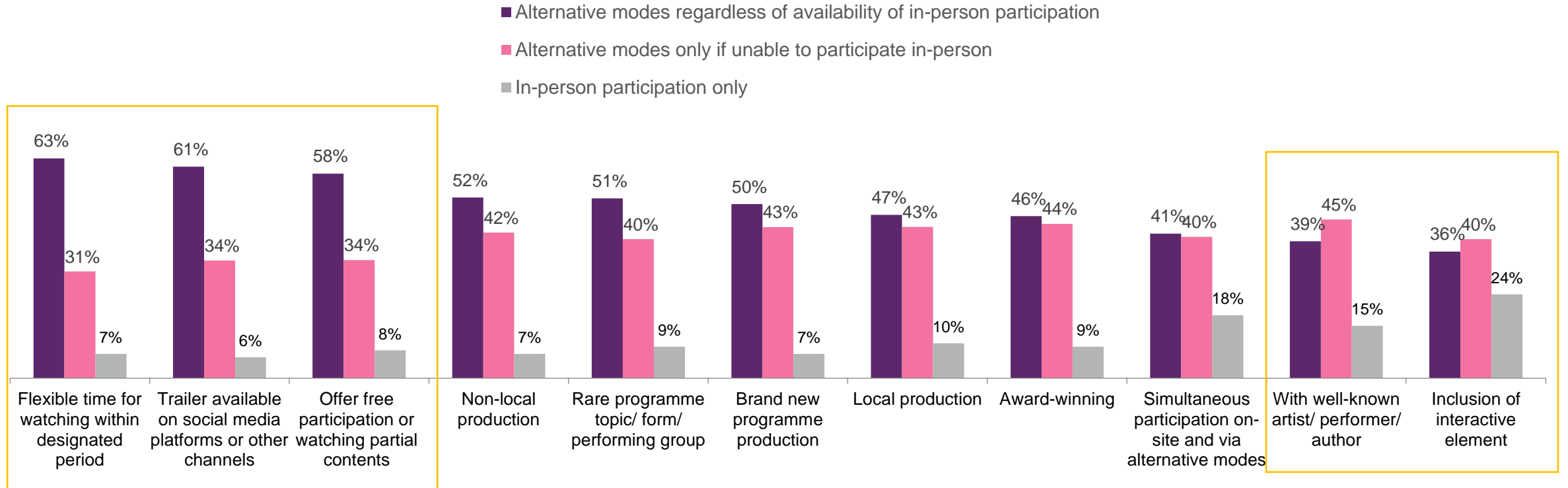
# Arts participation in Jan 2018 – Jan 2021 and claimed interest at post-COVID-19 period

- At individual art form level, there would be increased participation interest in any modes except in the alternative-mode programmes of Film and Media Arts and Literary Activities where a mild interest drop was observed.
- Physical modes were notably more preferable than alternative modes at post-COVID-19 period. In some art forms such as Visual Arts, Dance and Theatre, the preference gap for physical modes over alternative ones could be as high as 15, 11 and 10 percentage points respectively.



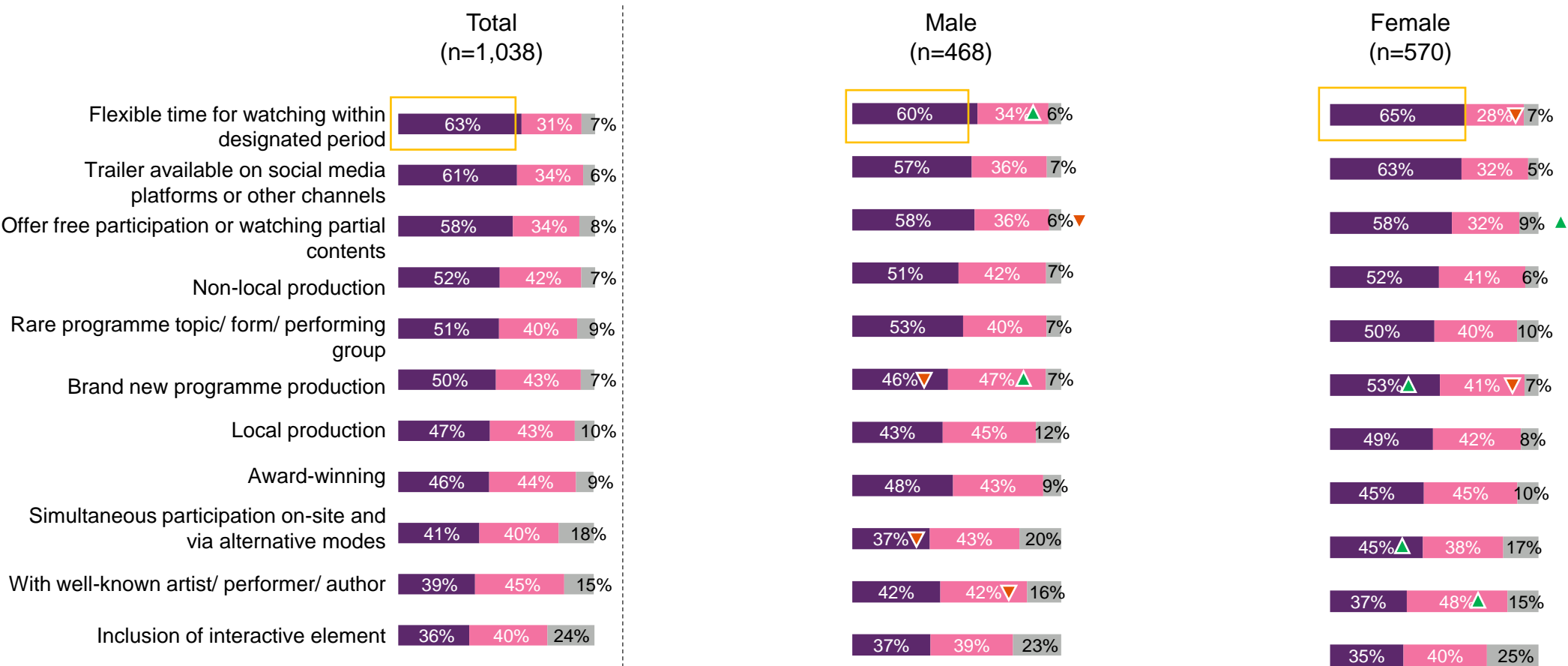
# Important elements driving arts participation in alternative modes

- Flexible programme time, online trailer and free participation in full or partial contents were among the key elements to attract potential participants to alternative modes over physical ones. This pattern was generally observed across different art forms.
- If the art programme involves well-known artist/ performer/ author or interactive elements, more potential participants would take part in alternative modes only if they are unable to do so in person.



# Important elements driving arts participation in alternative modes – by gender

- Male and female shown similar preferences over various elements in alternative-mode participation. Most of them would take part in alternative modes if the programme offers flexible time for watching.



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

**YouGov**    **Top factor**

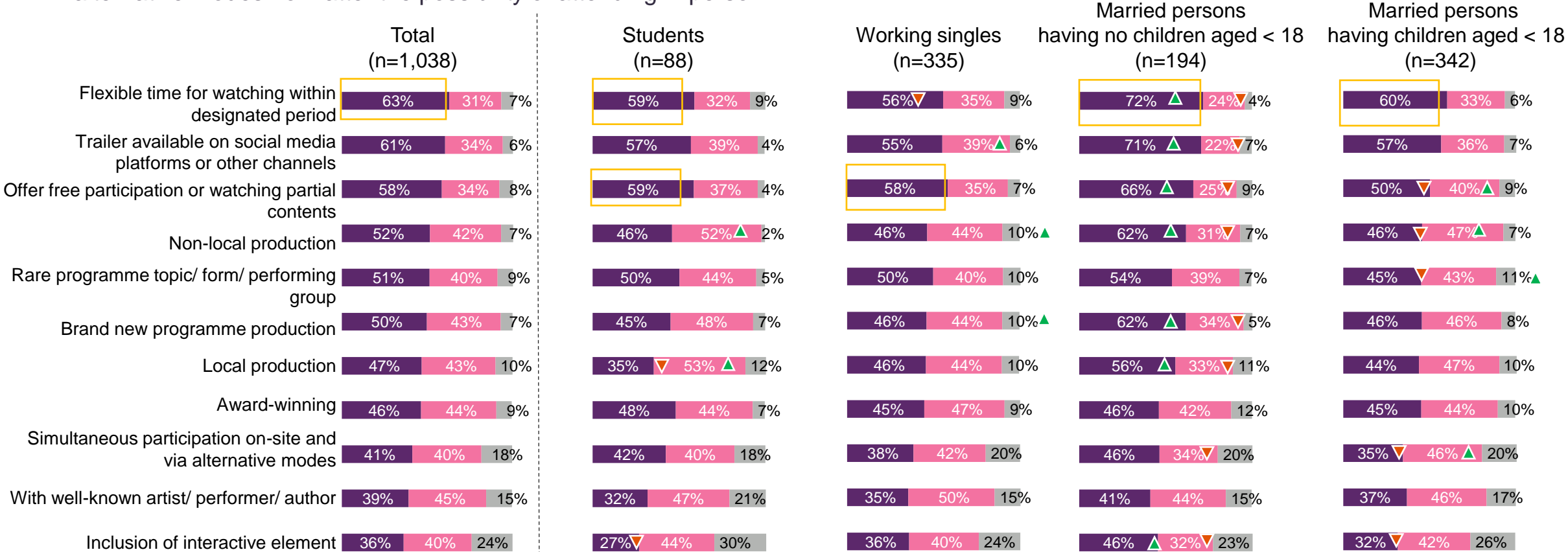
Base: Those who consider any arts participation in alternative modes in post-COVID-19 period, n=1,038

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

# Important elements driving arts participation in alternative modes – by life segments

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

- More married persons having children under 18 would consider alternative modes only if they were unable to participate in person, which was in line with their higher preference for physical-mode programmes as seen from slide 47.
- On the other hand, while married persons having no children under 18 were generally less eager in arts participation, for those who did express interest in alternative-mode participation at post-COVID-19 period, a relatively large portion of them were willing to participate in alternative modes no matter the possibility of attending in person.



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

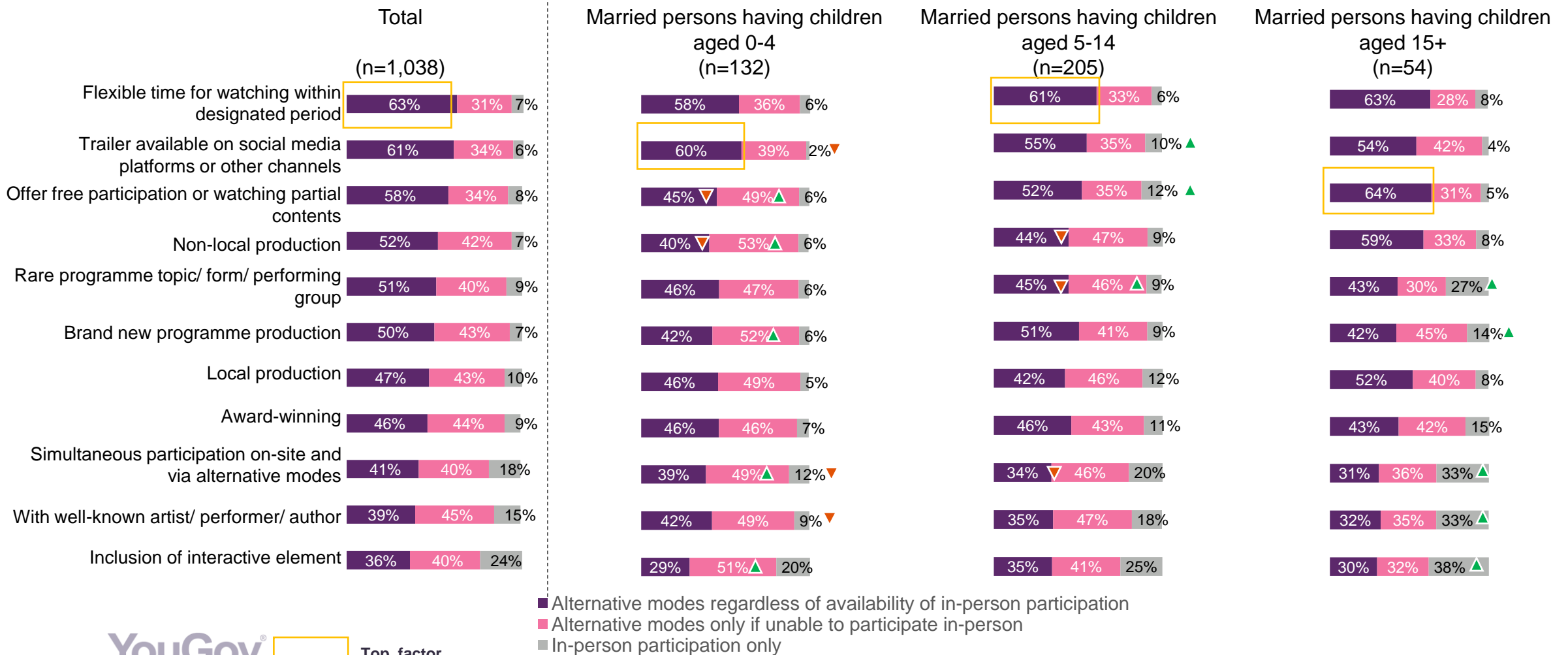
**YouGov** Top factor

Base: Those who consider any arts participation in alternative modes in post-COVID-19 period, n=1,038

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

# Important elements driving arts participation in alternative modes – by life segments

- Married persons having children at different ages valued different elements in alternative modes. Trailer availability would drive those with toddlers (aged 0-4); time flexibility would attract those with young children (aged 5-14); and free or partial participation would be favourable for those having children aged 15+.



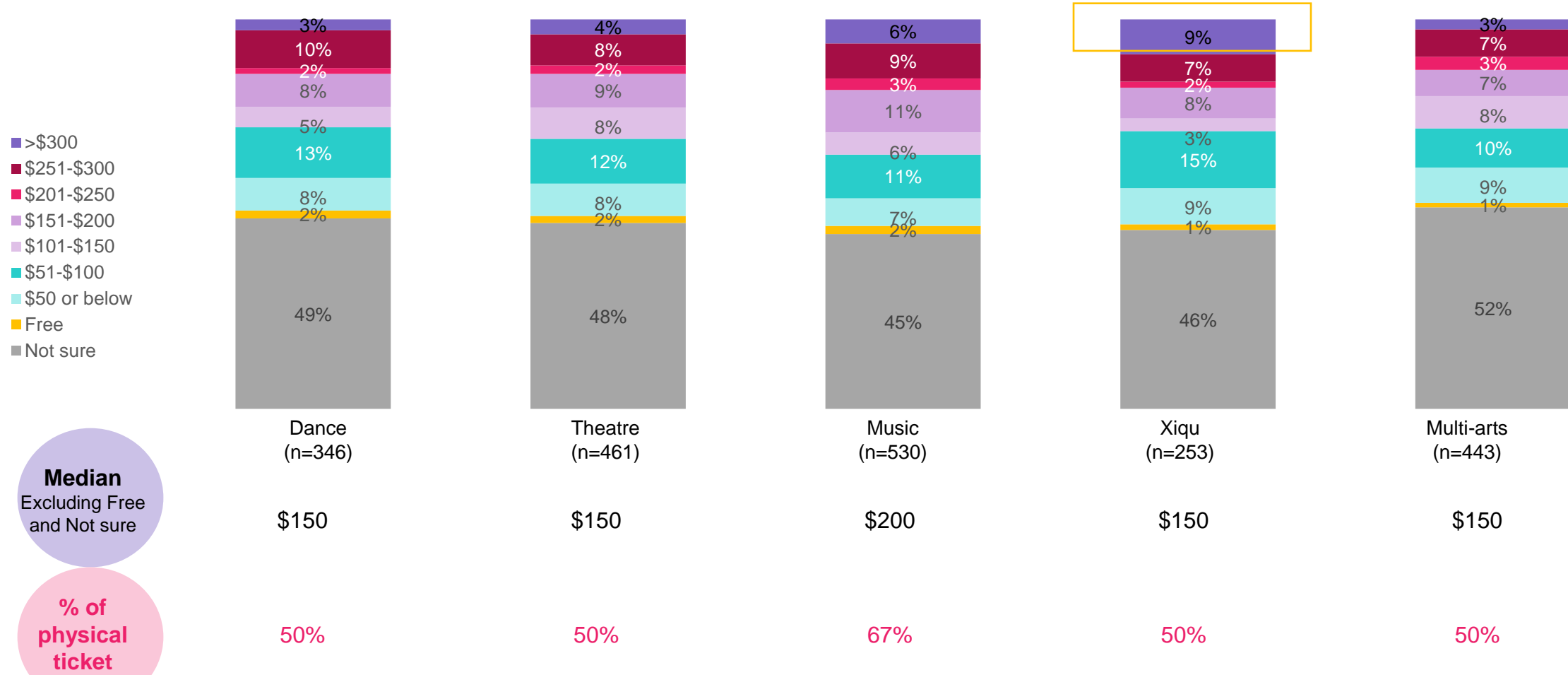
Base: Those who consider any arts participation in alternative modes in post-COVID-19 period, n=1,038

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

# Acceptable price level for arts participation via alternative modes

Note: Assuming ticket price HKD300 for in-person admission

- Potential alternative-mode participants generally expected a 50% discount off the physical ticket price for Dance, Theatre, Xiqu and Multi-arts. Potential Music participants were willing to pay a bit more (67% of physical ticket price) in alternative modes.
- 9% of potential alternative-mode participants in Xiqu programmes claimed that they would be willing to pay more than the physical ticket price.

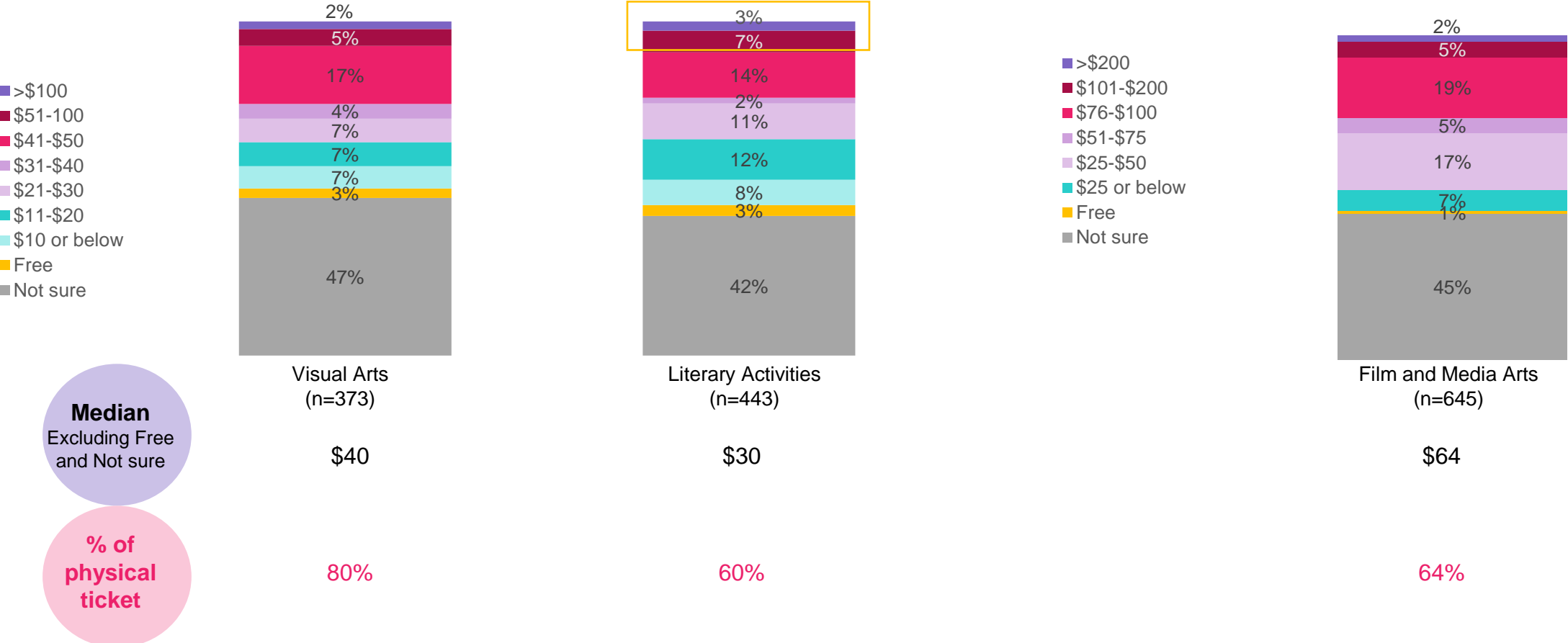


Base: Those consider alternative modes for participating respective art forms at post-COVID-19

# Acceptable price level for arts participation via alternative modes

Note: Assuming ticket price HKD50 for in-person admission for Visual Arts and Literary Activities, and assuming ticket price HKD100 for in-person admission for Film and Media arts

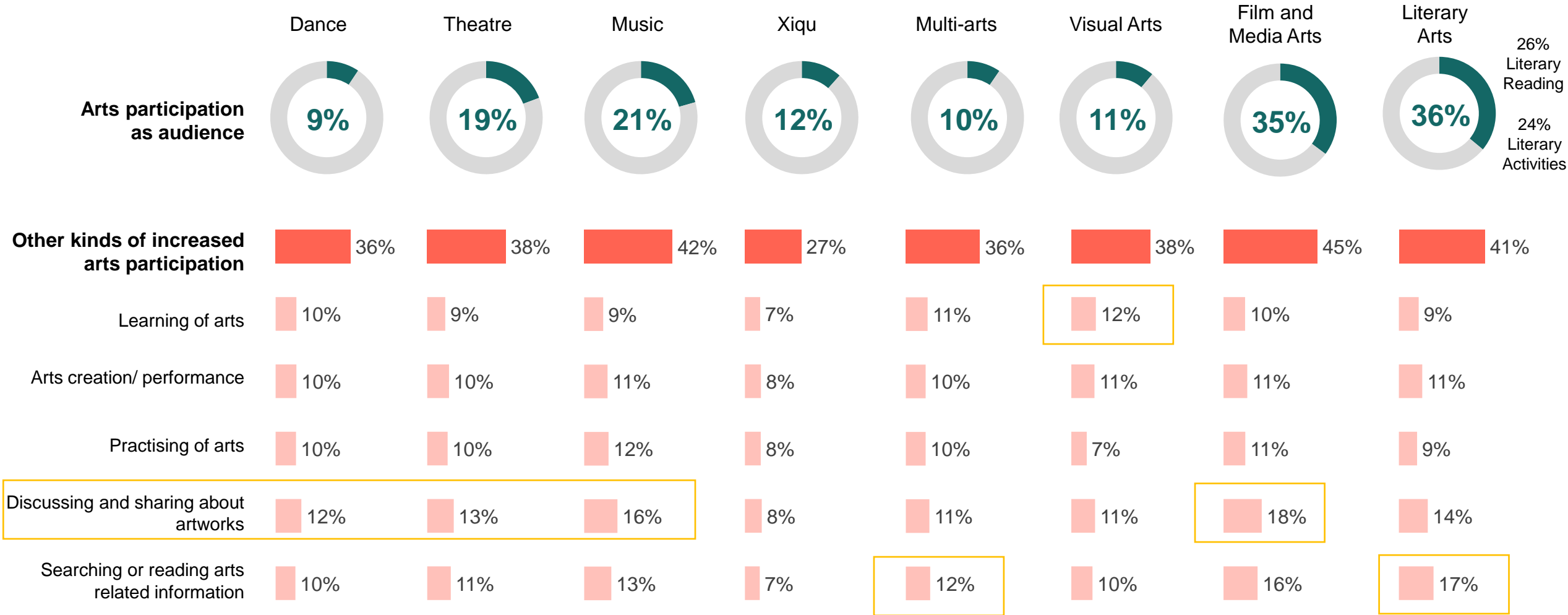
- Potential alternative-mode participants in Visual Arts were willing to pay the closest value to physical ticket (80% of physical ticket).
- The acceptable price levels for alternative-mode Literary Activities were polarised – although the median acceptable price was \$30 (60% of physical ticket), 10% of potential alternative-mode participants willing to pay above the physical ticket price.
- For Film and Media Arts, potential participants expected the alternative-mode price to be around two-third of physical one.



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

# All kinds of arts participation during COVID-19 – by art forms

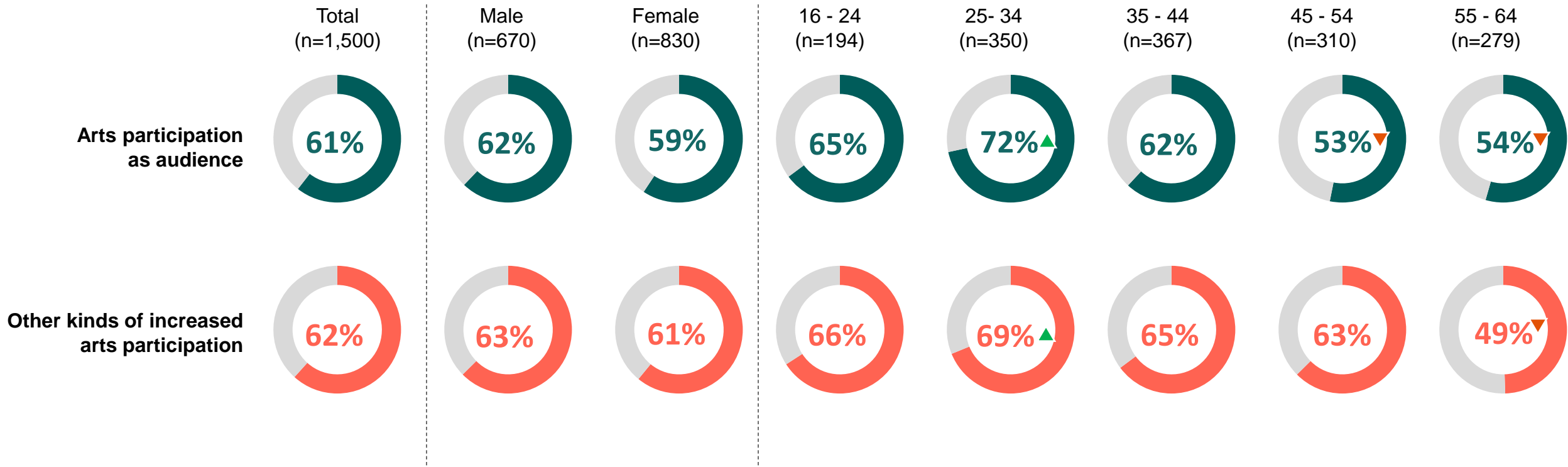
- Across all art forms, the incidence in other kinds of arts involvement – the most common ones being discussing and sharing about artworks, and searching or reading arts related information – was higher than that in participation as audience. This meant that some lapsed or non-participants in arts programmes during COVID-19 were still involved in arts in other ways.





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

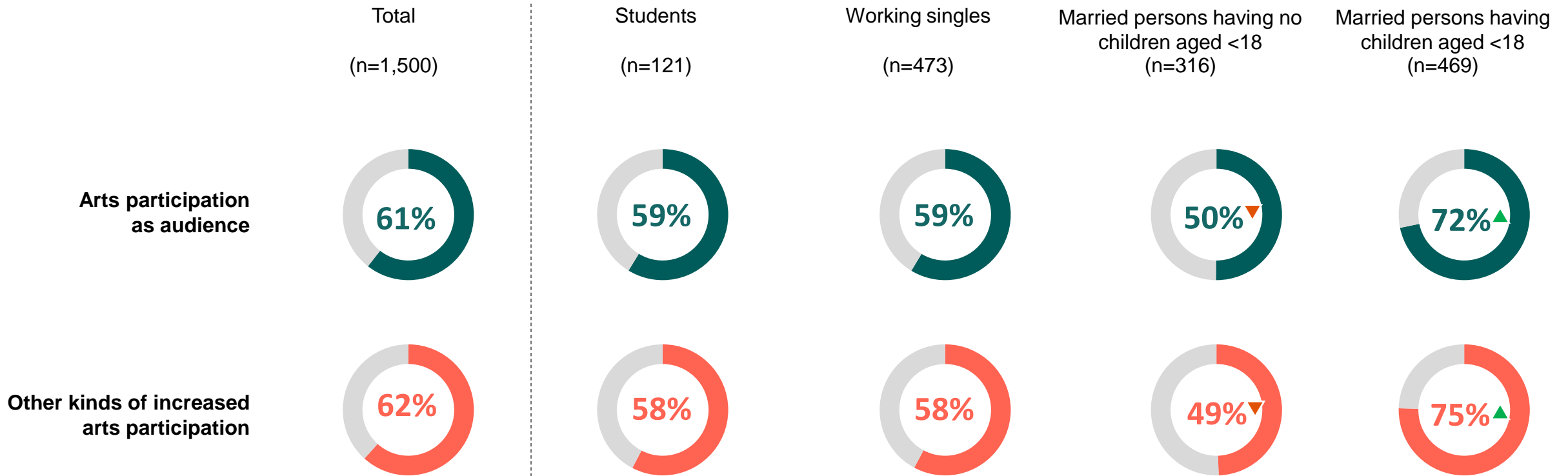
- People aged 25-34 were not only the most active audience in arts programmes during COVID-19, but they also involved the most in other arts activities (such as arts learning, creation/ performance, practising). On the other hand, people aged 55-64 involved the least in arts during COVID-19.
- Although only 53% of people aged 45-54 had participated in arts programmes as audience during the epidemic, 63% were still involved in arts in other ways.



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

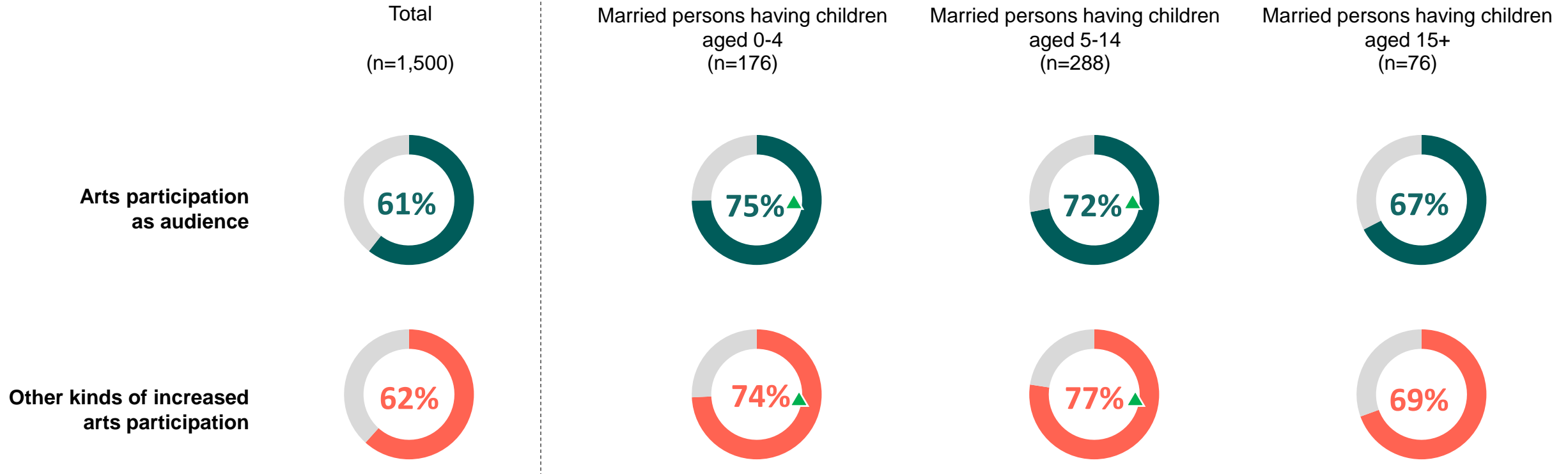
Note to readers: The segment of retirees is not shown due to small base (n=26)

- Looking into the participation across different life segments, married persons having children aged under 18 were most active in terms of both participation as audience and other kinds of arts involvement.



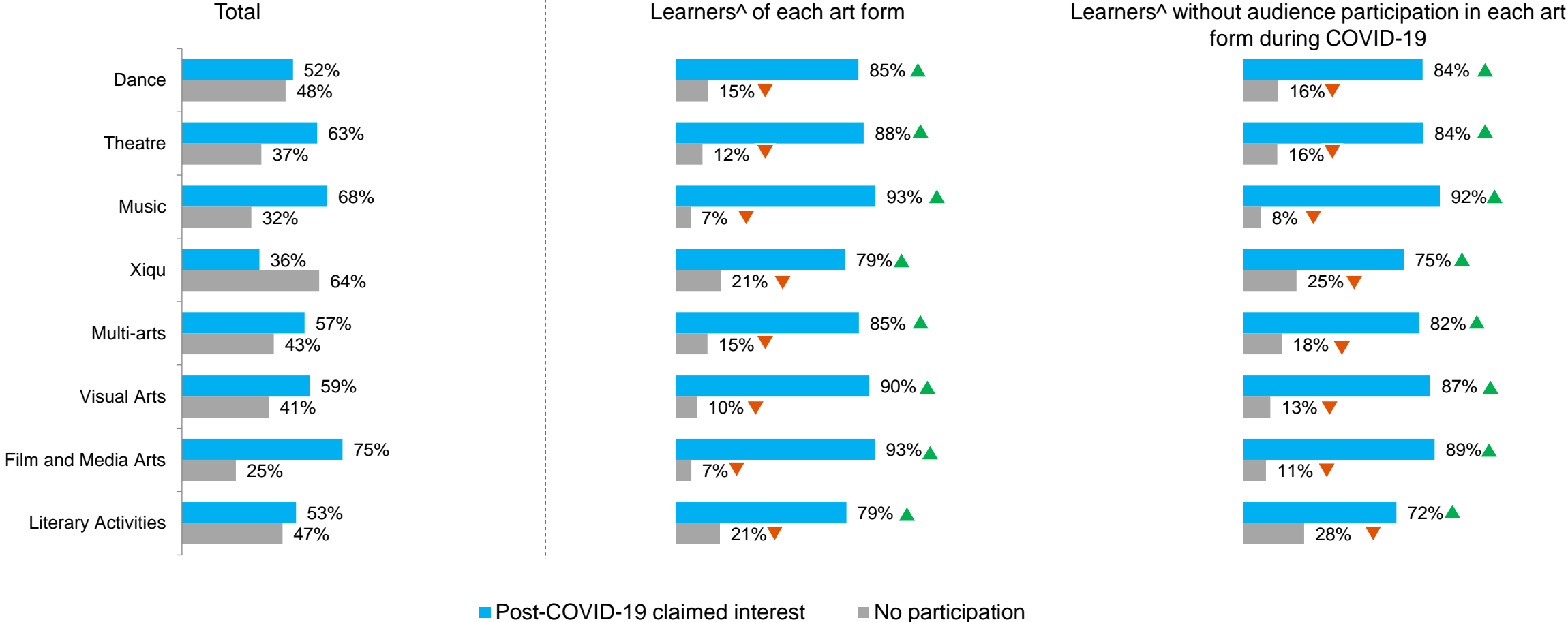
# All kinds of arts participation during COVID-19 – by life segments

- Similar to their high participation as arts audience, married persons having children under 14 years old were also more active in other kinds of arts involvement during COVID-19.



# Increased arts learning during COVID-19 and claimed interest at post-COVID-19 period

- In particular, those who had increased their arts learning during COVID-19 were found to have higher interest in future participation in the respective art form (close to 80% or more) – even for those who had not participated as audience during the period.



**YouGov** Note: ^The question asked for increased involvement in arts learning during COVID-19, so the sample here did not cover all arts learners as some of them might not have done more learning during the epidemic.

Base: All respondents, n=1,500

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