

Individual Art Form Analysis - Multi-arts

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Key highlights

- Participation in Multi-arts remained relatively stable at 10% during COVID-19. 4% of total respondents are retaining participants and 30% are lapsed participants since COVID-19. Young adults aged 25-34 were the most active in Multi-arts participation both as audience and in other kinds of arts activities, whereas people aged 55-64 participated the least in the art form.
- 30% of lapsed participants had only participated in physical-mode programmes in 2018-2019. The lower availability of physical programmes during COVID-19 might be a reason why they ceased participation.
- Almost all participants (96%) took part in alternative modes during COVID-19, with social media platforms, TV/ radio broadcast and paid video-on-demand platforms being the most popular channels. Compared to physical-mode participation before the epidemic, alternative-mode participation during COVID-19 was notably more frequent and involved more free programmes. The alternative-mode participants during COVID-19 also enjoyed slightly more non-local productions than their physical-mode counterparts did in 2018-2019.
- Claimed interest (57%) in future Multi-arts programmes more than tripled the actual participation incidence in past 3 years (Jan 2018 – Jan 2021). While participation in both physical and alternative modes would be expected to rise, the growth would be more prominent for physical-mode participation (from 6% to 33%).
- Actual participants in past 3 years as well as the potential participants were likely to be married persons having children under 18, blue-collar workers and people with monthly household income at HKD 30,000 or above.
- 85% of potential participants were lapsed participants or non-participants, and they suggested that the lack of programme information was the major reason for their non-participation in Multi-arts in recent years. Further efforts should be made to reach out to these potential participants, for example through social media platforms, ads on mobile apps or websites, and emails.
- Over a quarter of non-participants with interest in physical Multi-arts programmes also said that the high ticket price had deterred them from participation. Hence future programmes might have to be more affordable to attract these potential participants.

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?

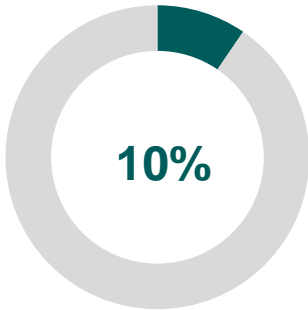
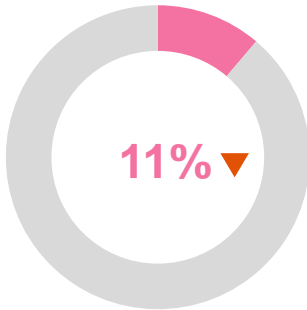
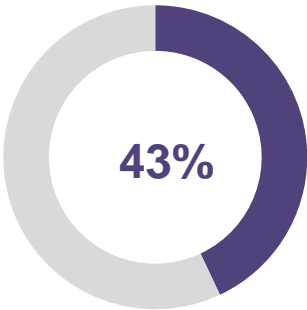
 Ever-Participation	Before 2018	In 2018-2019 (Before COVID-19)	During COVID-19 (Jan 2020 – Jan 2021)
• Retaining participants	✓	✓	✓
• Young participants		✓	✓
• Returning participants	✓		✓
• New participants			✓
• Lapsed participants since COVID-19	✓	✓	
		✓	
• Lapsed participants since 2018	✓		
• Non-participants			

Arts participation – Multi-arts

- Participation in Multi-arts remained relatively stable at 10% during COVID-19.
- Compared to other art forms, Multi-arts had the lowest percentages of retaining participants and of lapsed participants since COVID-19.



Participation Incidence



Projected Population

1,866,133

486,317

414,020

Participation Segment

Projected Population

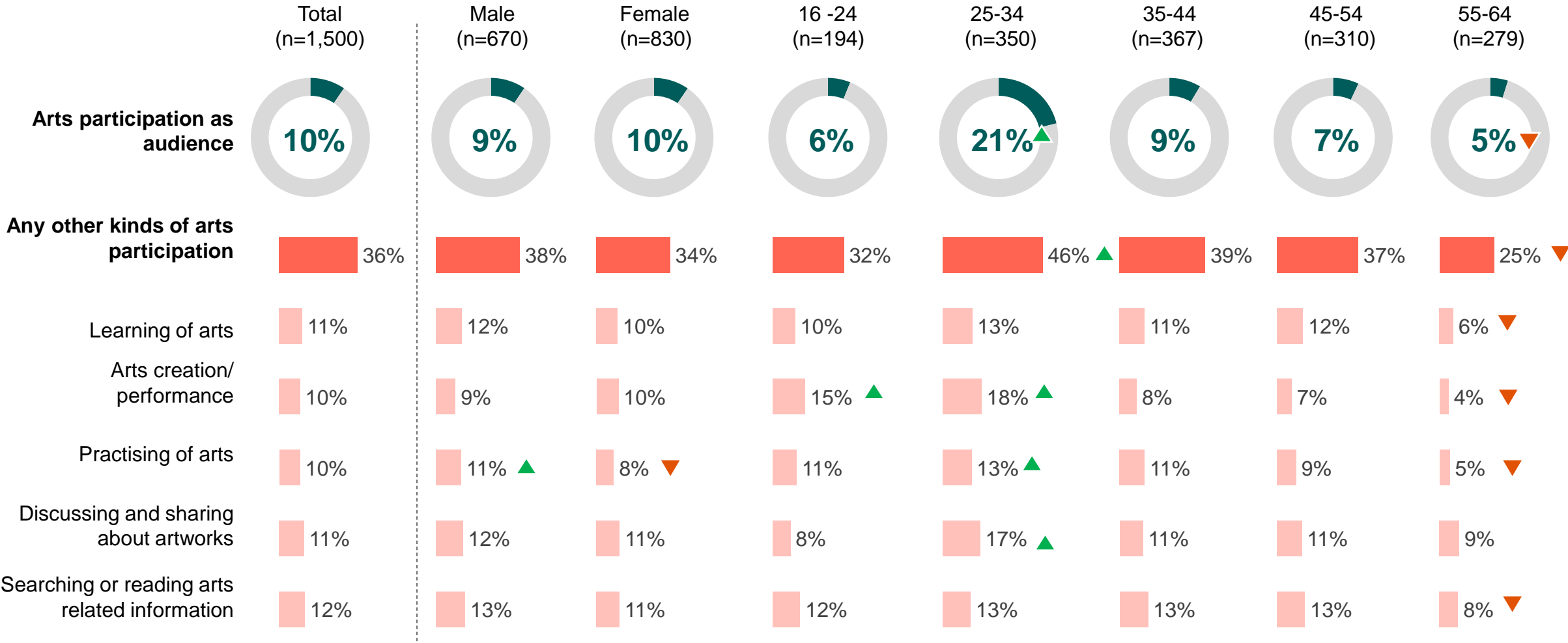
Participation Segment	Percentage	Projected Population
Total (n=1,500)		
Retaining participants	4%	182,518
Young participants	1%	27,221
Returning participants	4%	162,041
New participants	1%	42,240
Lapsed participants since COVID-19	6%	276,578
Lapsed participants since 2018	30%	1,300,779
Non-participants	54%	2,347,734



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 – Multi-arts – by demographics

- During COVID-19, young adults aged 25-34 were the most active in Multi-arts participation both as audience and in other kinds of arts activities, whereas the opposite was true for people aged 55-64.

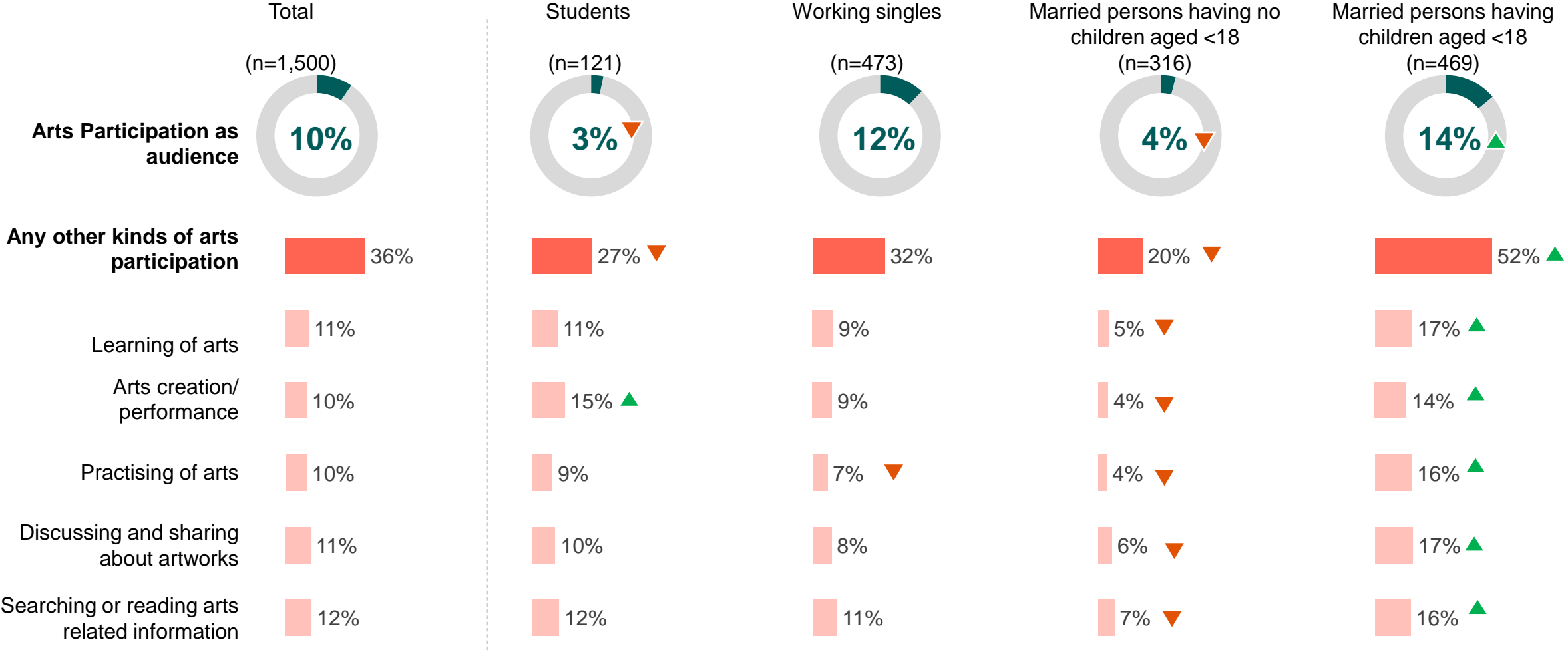


Base: All respondents, n=1,500
 ▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

All kinds of arts participation during COVID-19 – Multi-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 Multi-arts across all means. The participation rates for students and married persons having no young children were significantly lower.



Base: All respondents, n=1,500

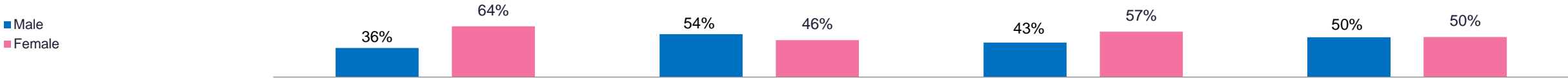
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Profiles of arts participants – Multi-arts

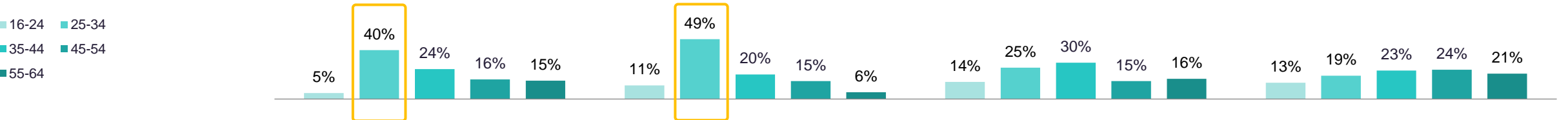
Note to readers: The segments of Young participants (n=9) and New participants (n=16) are not shown due to small base

- People aged 25-34 comprised a relatively high portion of retaining participants and returning participants in Multi-arts. (Note: The age group 25-34 made up 20% of the overall sample)

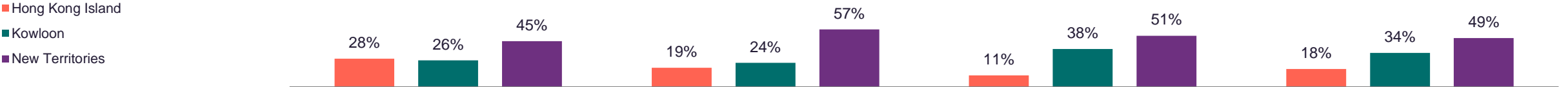
Gender



Age Group



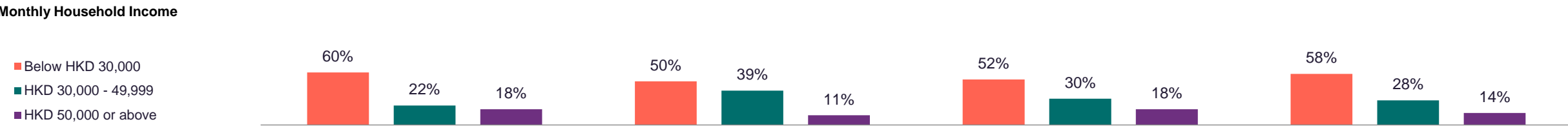
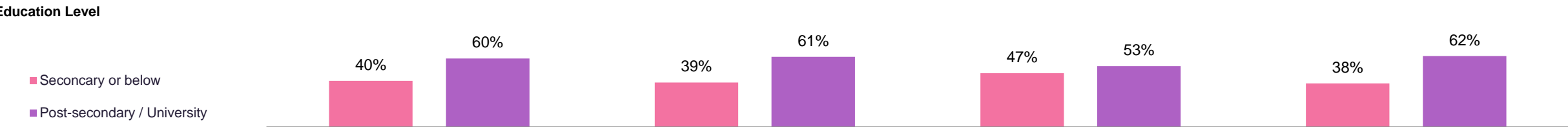
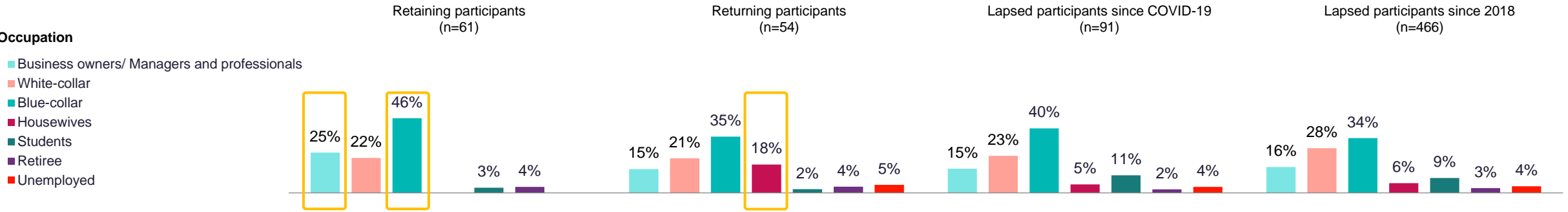
Region



Profiles of arts participants – Multi-arts

Note to readers: The segments of Young participants (n=9) and New participants (n=16) are not shown due to small base

- Retaining Multi-arts participants consisted of a relatively high percentage of business owners/ managers and professionals, as well as blue-collar workers; whereas there were a considerable proportion of housewives among returning participants. (Note: In the overall sample, the percentages of business owners/ managers and professionals, blue-collar workers, and housewives were 14%, 34% and 7% respectively)



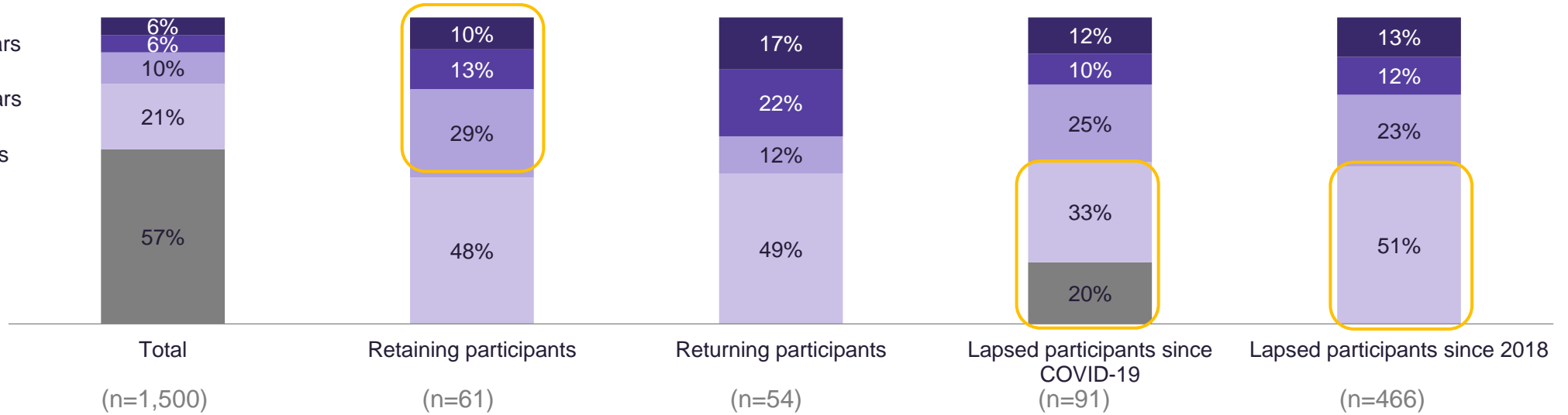
Arts participation before 2018 – Multi-arts

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

- Majority of retaining participants were stable participants for over 5 years (52%) before 2018.
- Over half of lapsed participants only participated occasionally or did not participate at all before 2018.

Participation before 2018

- Stable participation for > 10 years
- Stable participation for 5-10 years
- Stable participation for < 5 years
- Occasional participation
- No participation before 2018

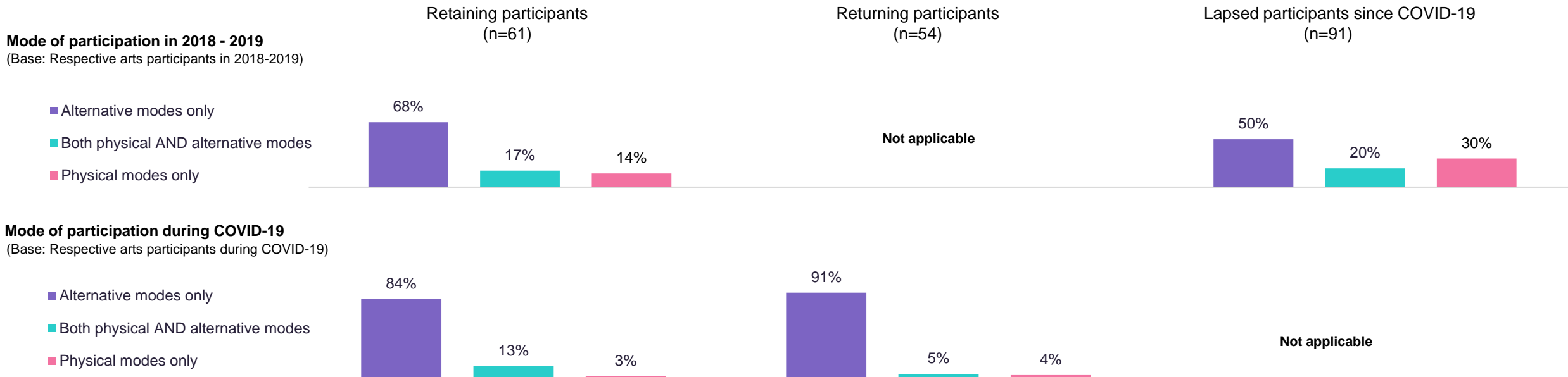


History of arts participation – Multi-arts

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=9) and New participants (n=16) are not shown due to small base

- Most retaining participants had already participated in alternative modes before COVID-19, and they continued to participate via alternative modes during the epidemic.
- 30% of lapsed participants had only participated in physical-mode programmes in 2018-2019. The lower availability of physical programmes during COVID-19 might be a reason why they ceased participation.

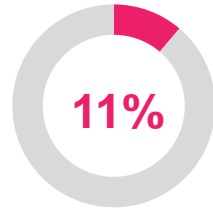
History of Arts Participation



Mode of participation among arts participants – Multi-arts

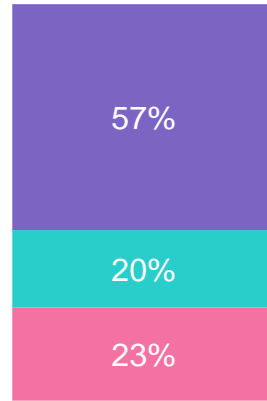
- Almost all COVID-19 participants took part in alternative-mode Multi-arts programmes, while physical participation dropped drastically from 43% to 16%.
- Social media platforms registered the strongest popularity growth and remained the most used channel for watching Multi-arts programmes; whereas designated official websites and TV/ radio broadcast became relatively less commonly used than before.

Participation Incidence (n=1,500)

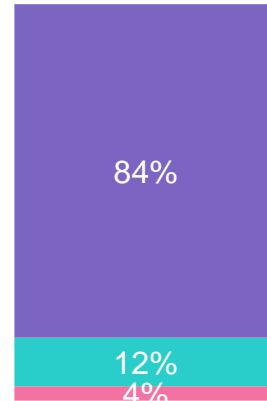
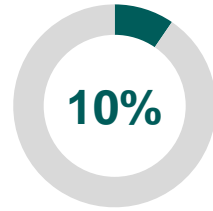


Mode of participation among participants

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



In 2018 – 2019
(n=161)



During COVID-19
(n=140)

Projected Population

Mode of Participation

Alternative modes only	277,131
Both physical AND alternative modes	94,930
Physical modes only	114,257

Alternative modes only	348,367
Both physical AND alternative modes	14,883
Physical modes only	50,770

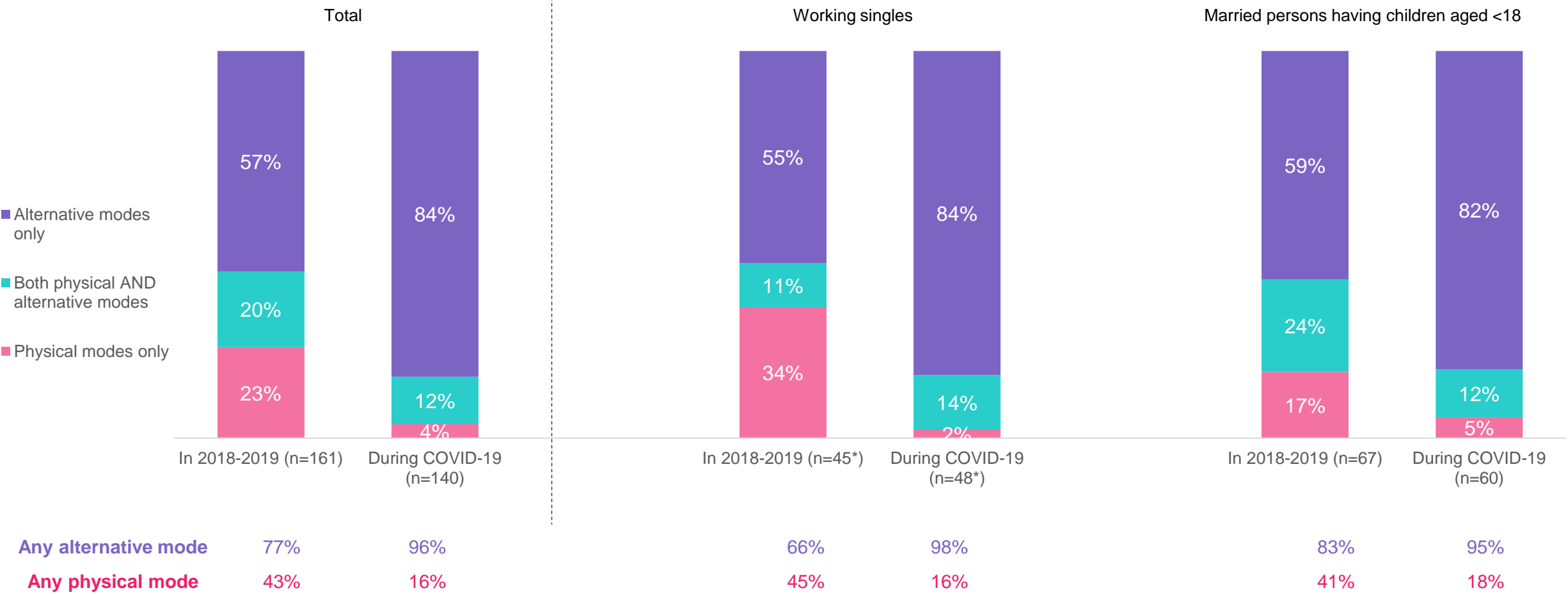


	In 2018 – 2019 (n=161)	During COVID-19 (n=140)
In-person admission	43%	16%
Any alternative mode	77%	96%
TV/ radio broadcast	44%	41%
Paid video-on-demand platforms (e.g. HBO, Netflix)	28%	29%
Social media platforms (e.g. Facebook, YouTube)	49%	63%
Video conferencing app (e.g. Zoom)	13%	19%
Designated official websites	28%	21%
DVD / CD	7%	11%
Via other online channels	12%	17%

Mode of participation among arts participants – Multi-arts – by life segments

Note to readers: The segments of students (n=12 in 2018-2019, n=4 during COVID-19), married persons having no children aged <18 (n=24 in 2018-2019, n=19 during COVID-19) and retirees (n=2 in 2018-2019, n=2 during COVID-19) are not shown due to small base

- The strong adaptation to alternative-mode participation was equally seen among working singles and married persons having children under 18.



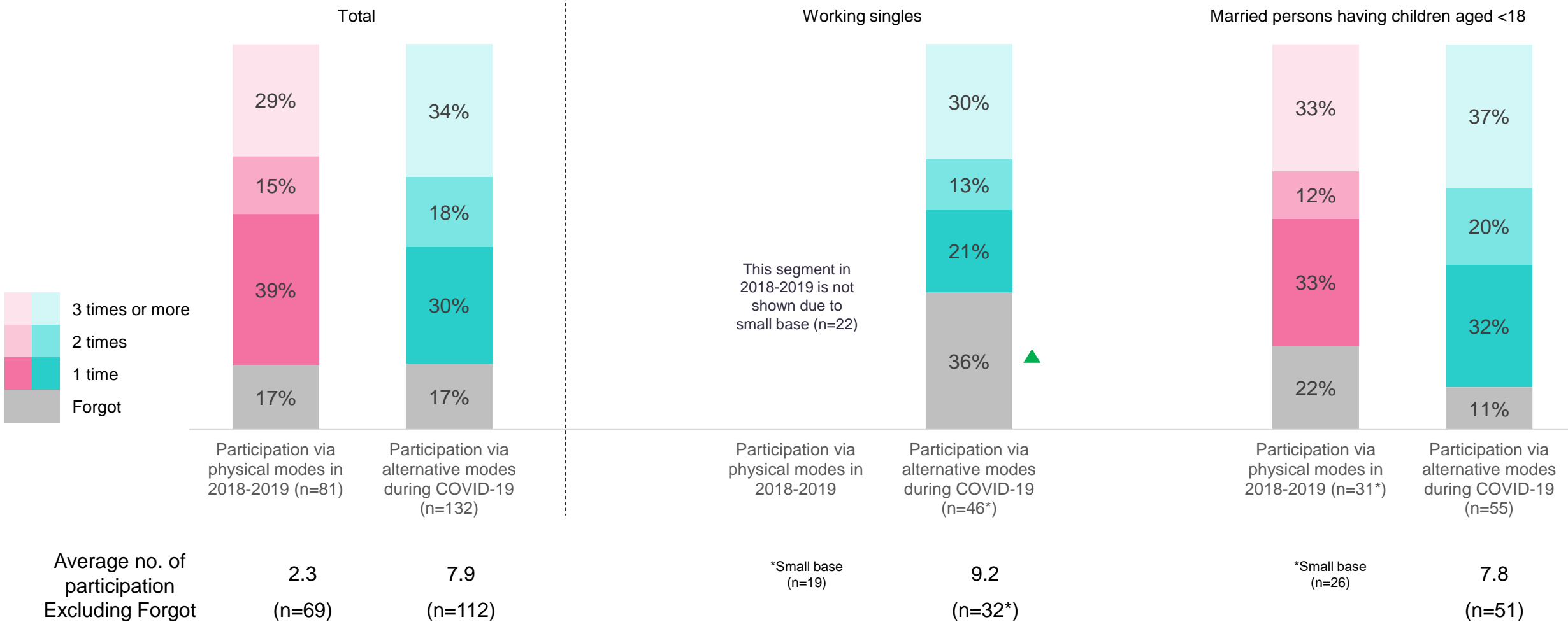
Base: Arts participants of respective art form in 2018-2019 and those during COVID-19

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

Changing frequency from physical to alternative modes – Multi-arts

Note to readers: The segments of students (n=9 in 2018-2019, n=4 during COVID-19), married persons having no children aged <18 (n=14 in 2018-2019, n=18 during COVID-19) and retirees (n=1 in 2018-2019, n=2 during COVID-19) are not shown due to small base

- The switch from physical to alternative modes greatly increased participation frequency – alternative-mode participants took part in 7.9 Multi-arts programmes on average during COVID-19.



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.

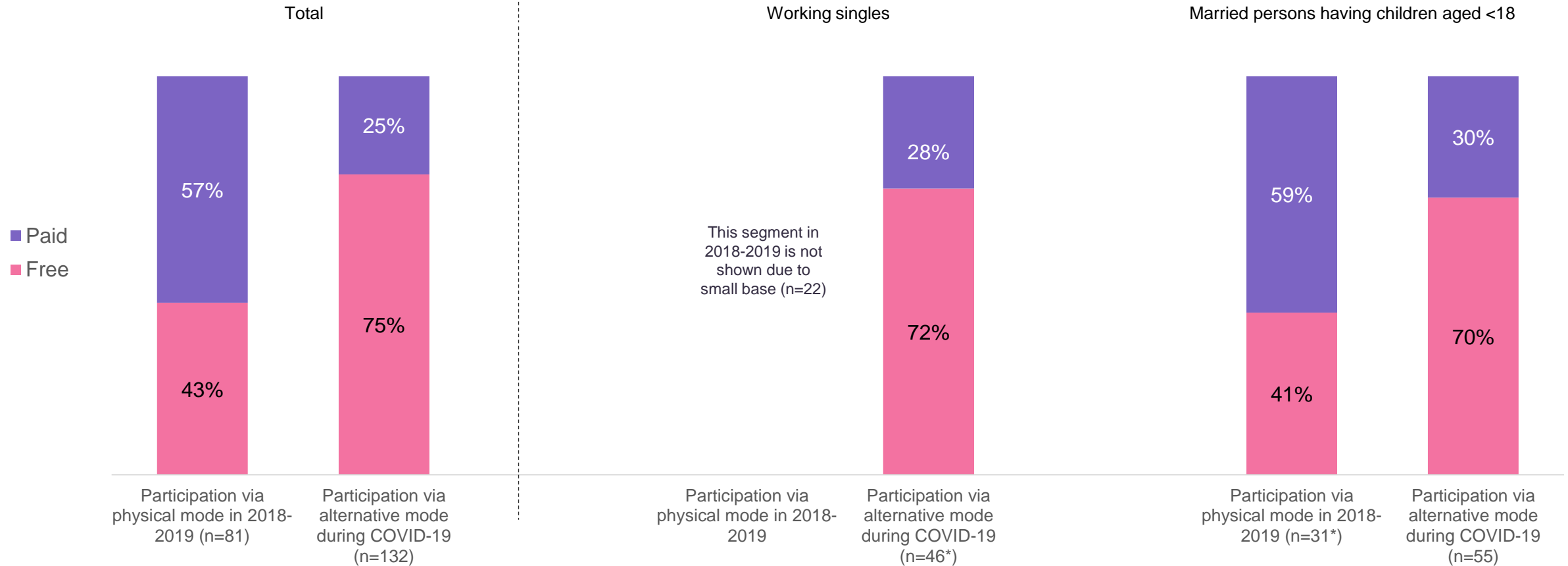
Base: Physical-mode participants of respective art form in 2018-2019, and alternative-mode participants of respective art form during COVID-19

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

Average ratio of participating free/ paid arts programmes – Multi-arts

Note to readers: The segments of students (n=9 in 2018-2019, n=4 during COVID-19), married persons having no children aged <18 (n=14 in 2018-2019, n=18 during COVID-19) and retirees (n=1 in 2018-2019, n=2 during COVID-19) are not shown due to small base

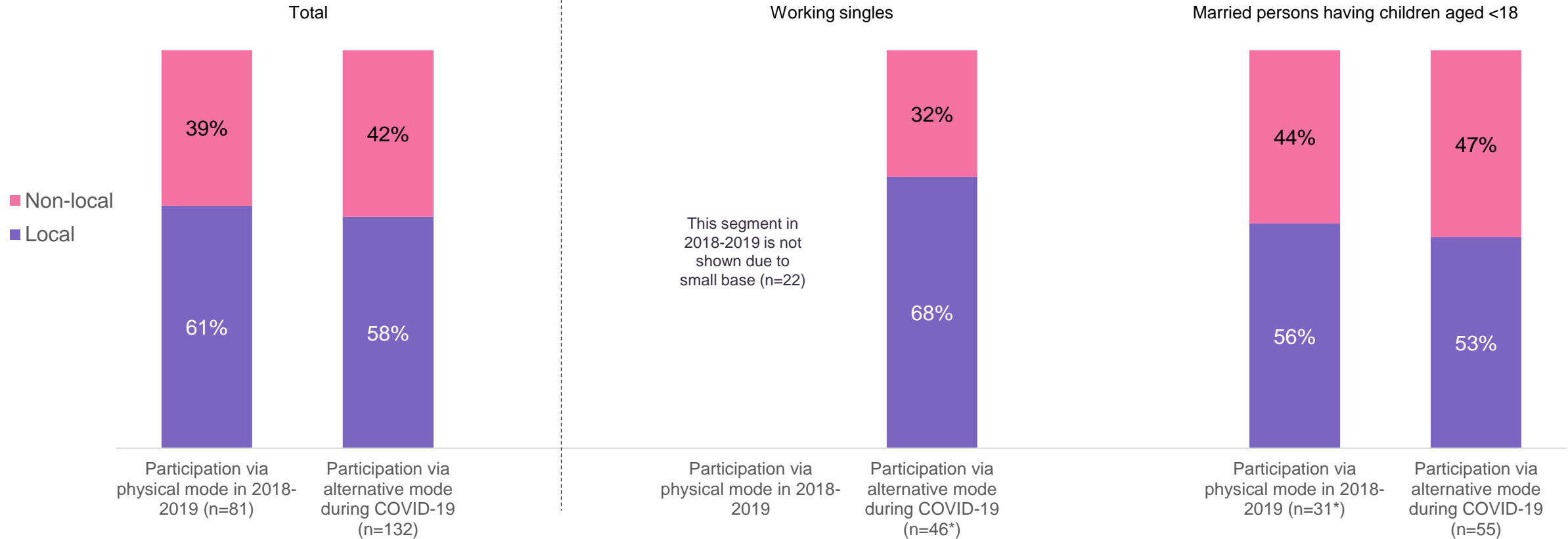
- Alternative-mode participation during COVID-19 was more inclined towards free programmes, which might also explain for the higher participation frequency as seen from previous slide.



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

Note to readers: The segments of students (n=9 in 2018-2019, n=4 during COVID-19), married persons having no children aged <18 (n=14 in 2018-2019, n=18 during COVID-19) and retirees (n=1 in 2018-2019, n=2 during COVID-19) are not shown due to small base

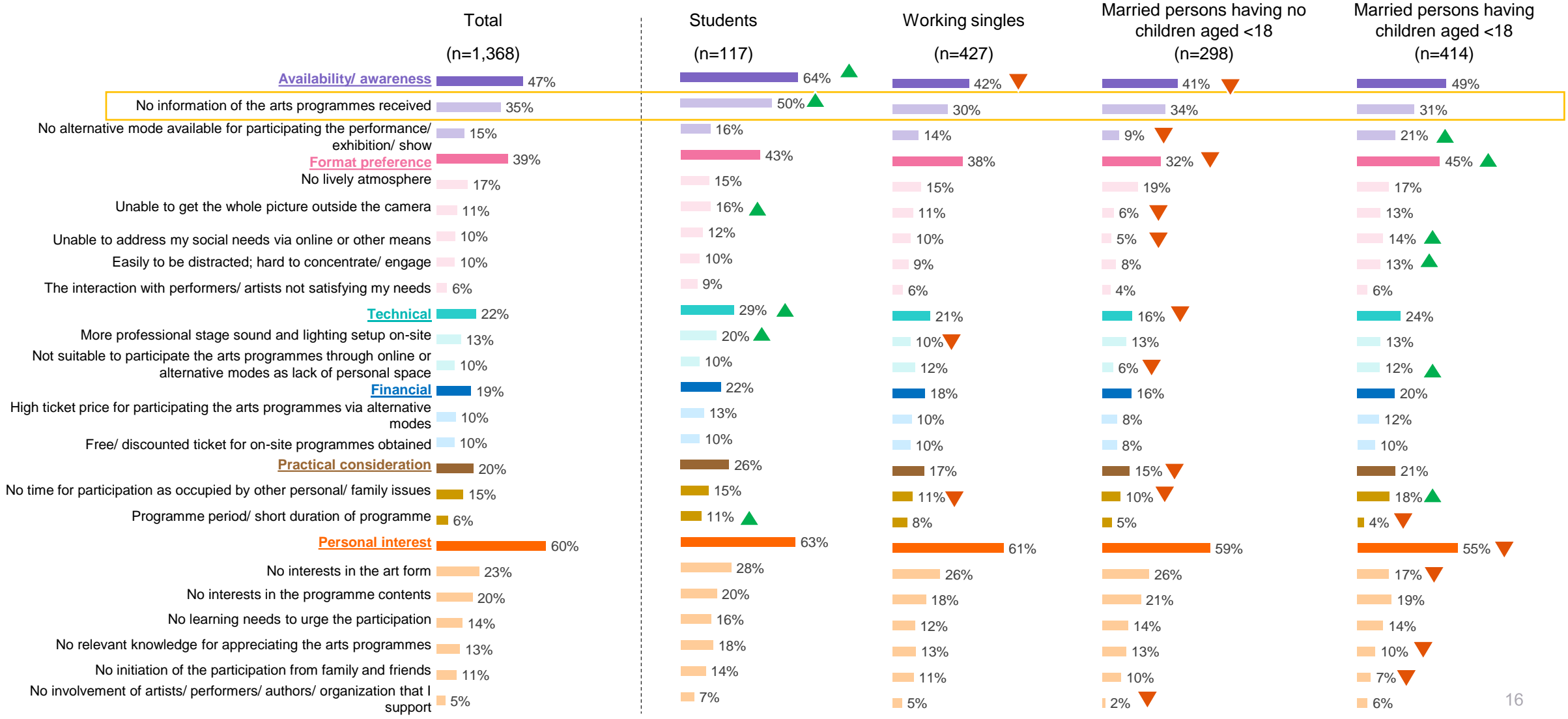
- Alternative-mode participants during COVID-19 watch a slightly higher percentage of non-local productions than their physical-mode counterparts in 2018-2019.



Reasons for not participating via alternative modes during COVID-19 – Multi-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 the art form (23%) were the two main reasons of non-participation during COVID-19.
- Married persons having children under 18 and students were also relatively concerned about the alternative-mode format.



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

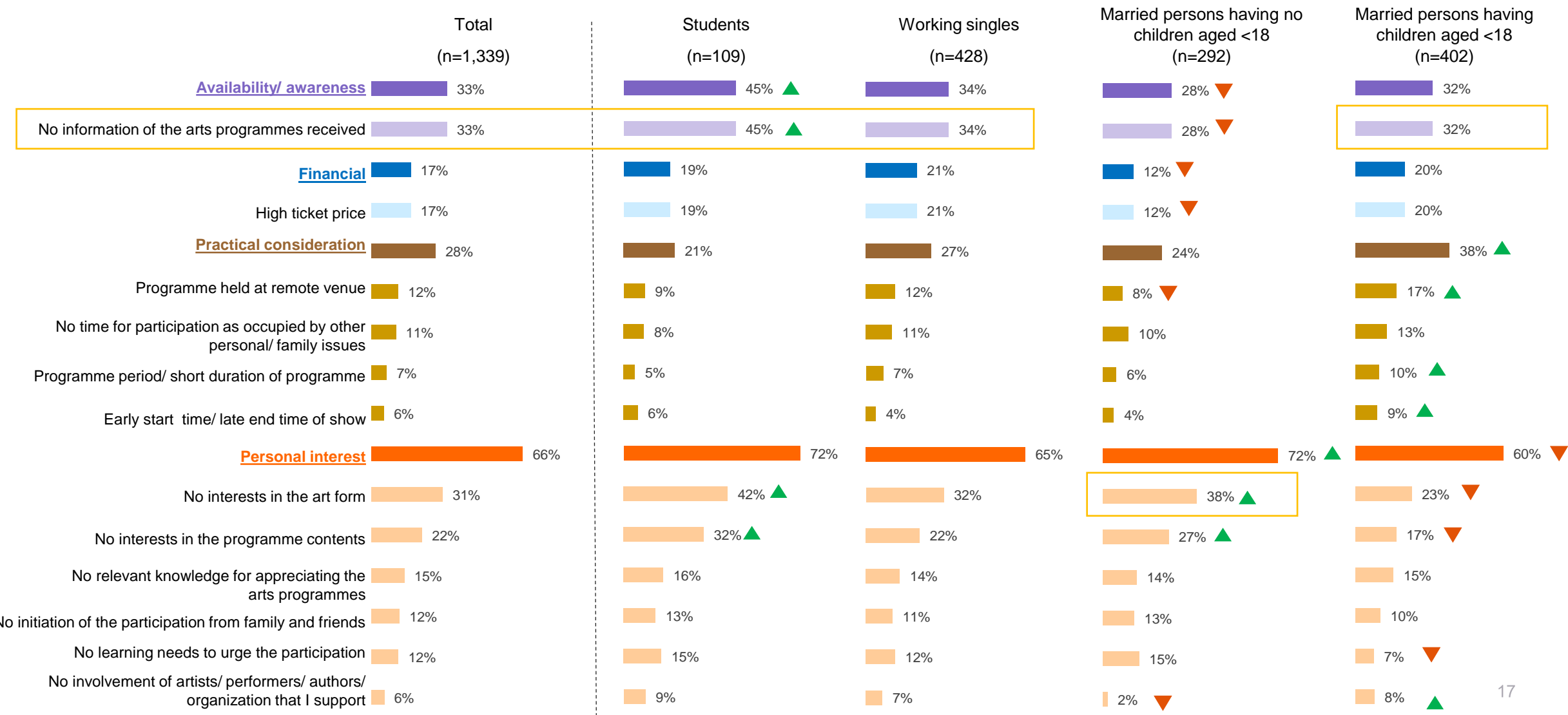
▲ ▼ Denote the figure of the segment is significantly higher/ lower than the total

Top reason

Reasons for not participating in 2018-2019 – Multi-arts

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

- Compared to 2018-2019, lack of programme information was also the major reason for non-participation in Multi-arts programmes except for married persons without young children, who did not participate mainly because they were not interested in the art form.



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

 Top reason

Voices of respondents in participating the arts activities in alternative modes

Multi-arts

how to utilize online interactions and different media to enrich the experience

Female, aged 40

應該網上多介紹跨媒體藝術，試播新作品

Female, aged 57

3D virtual reality simulations

Male, aged 45

provide basic knowledge to enjoy this kind of art

Male, aged 43

可看或可移動的角度不能太狹窄，應盡量模仿親身看的視角，例如VR(可動視角)

Female, aged 20

Artist introduce the art

Male, aged 45

more details about performance

Female, aged 51

製作單位與觀眾交流

Male, aged 40

provide basic knowledge to enjoy this kind of art

Male, aged 43

跨媒體製作的過程之演出

Male, aged 63

提供不同媒體藝術，豐富觀眾的體驗

Female, aged 28

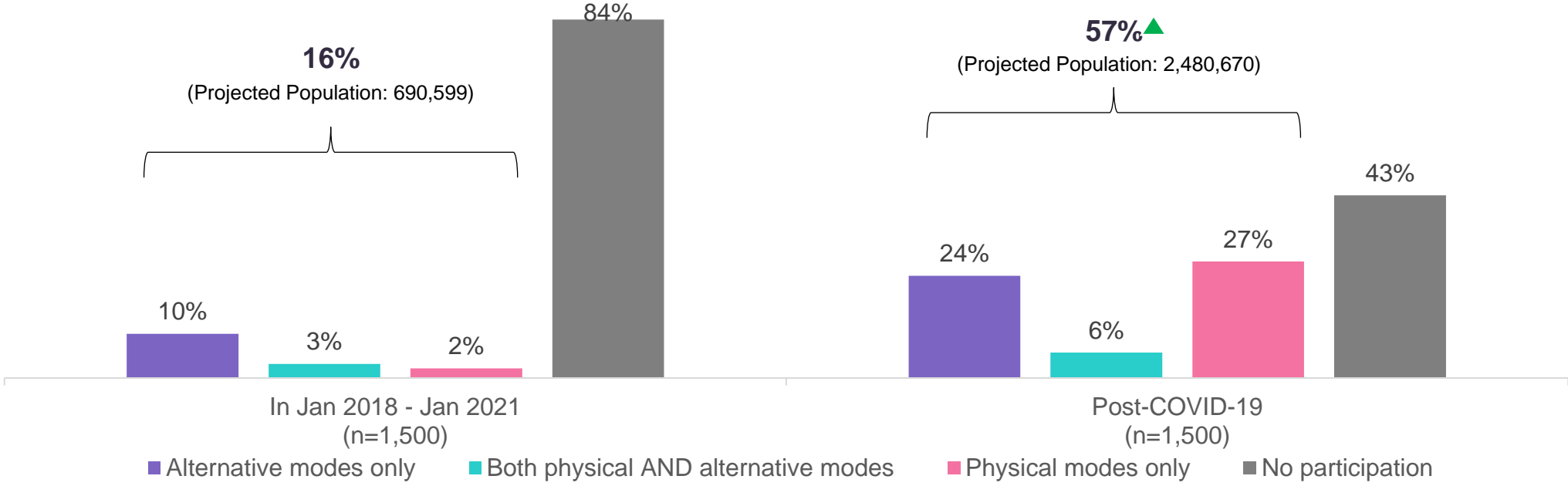
由網上串流觀眾即時投票，讓表演者做即興演出

Male, aged 30

Potential Participants of Multi-arts

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

- 57% of respondents expressed interest in future Multi-arts programmes, more than triple the actual participation incidence (16%) in the art form in recent years.
- Participation in physical and alternative modes would both be expected to grow, although the growth would be more prominent for physical-mode programmes (from 6% to 33%).



	In Jan 2018 - Jan 2021	Projected Population	Post-COVID-19	Projected Population
Any alternative mode	14%	592,720	30%	1,296,232
Any physical mode	6%	240,751	33%	1,441,818



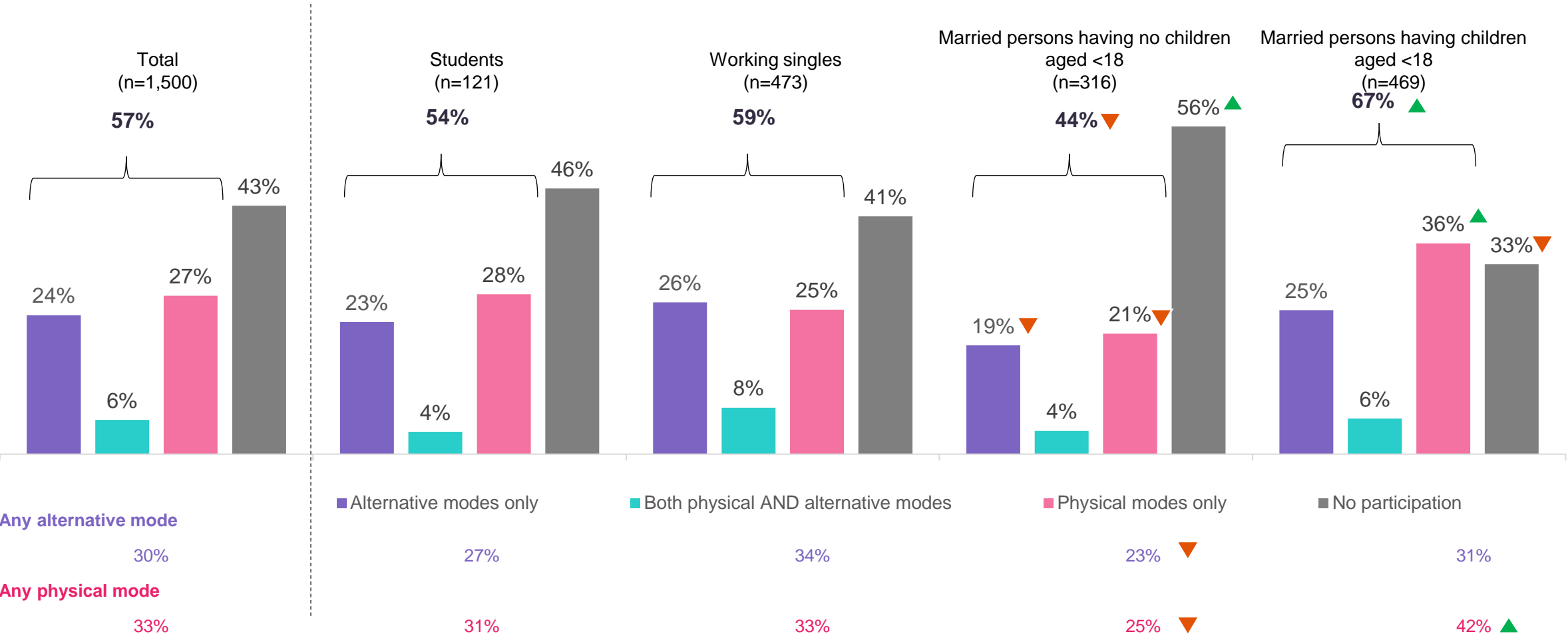
Base: All respondents, n=1,500

▲ ▼ 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 – Multi-arts – by life segments

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

- Married persons having children under 18 were most eager to participate in future Multi-arts programmes, and they shown a clear preference for physical participation as compared to other life segments.

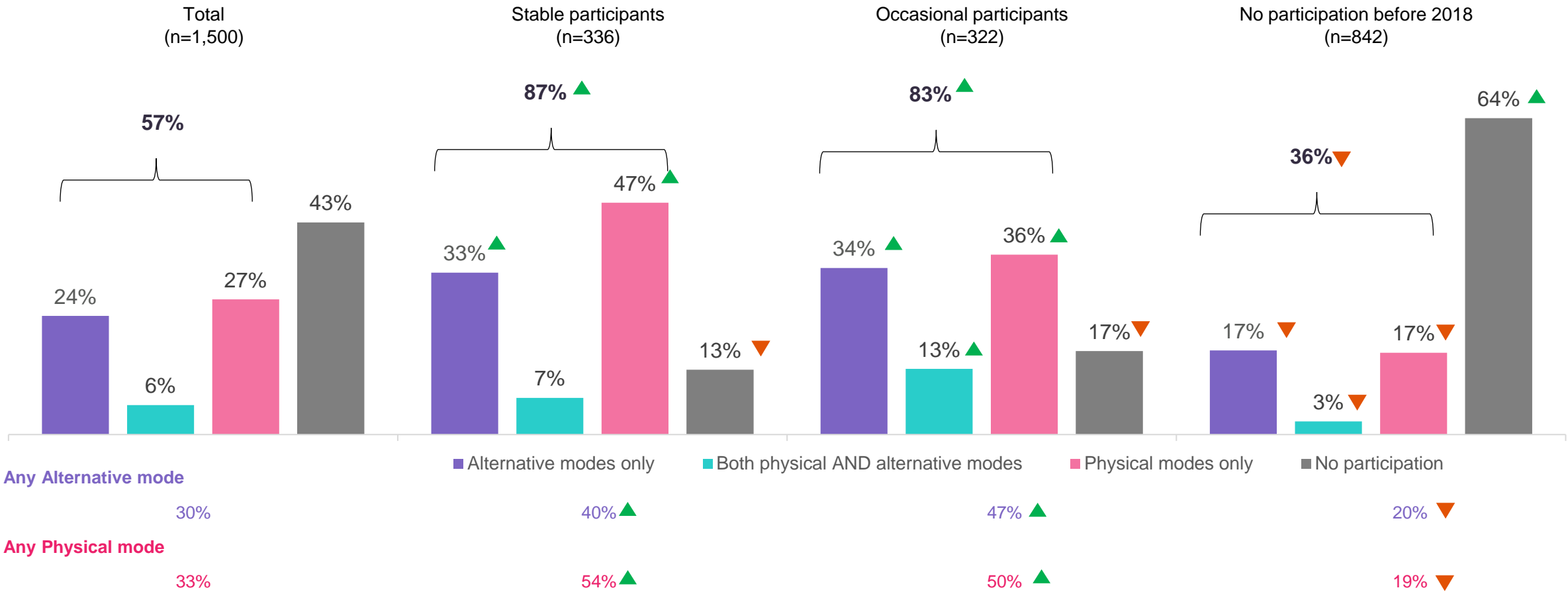


Base: All respondents, n=1,500

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

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

- While both stable and occasional participants before 2018 were similarly likely to participate in future Multi-arts programmes, stable participants shown stronger preference towards physical programmes and occasional participants were relatively more open to the mode of participation.



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

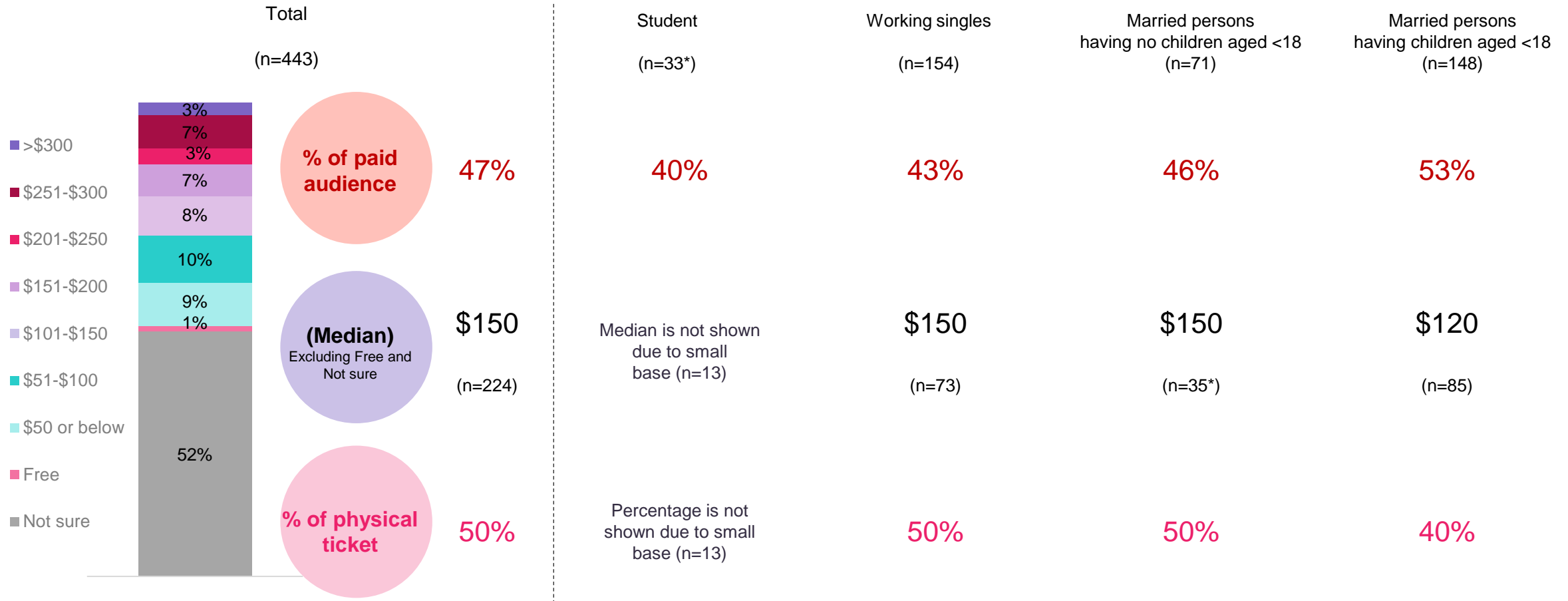
Base: All respondents, n=1,500

▲ ▼ 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 – Multi-arts – by life segments

Note to readers: The segment of retirees (n=5) is not shown due to small base
Assuming ticket price HKD300 for in-person admission

- Slightly less than half of potential alternative-mode participants were willing to pay for alternative modes at post-COVID-19 period, and they typically expected a 50% discount off the physical ticket price.



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

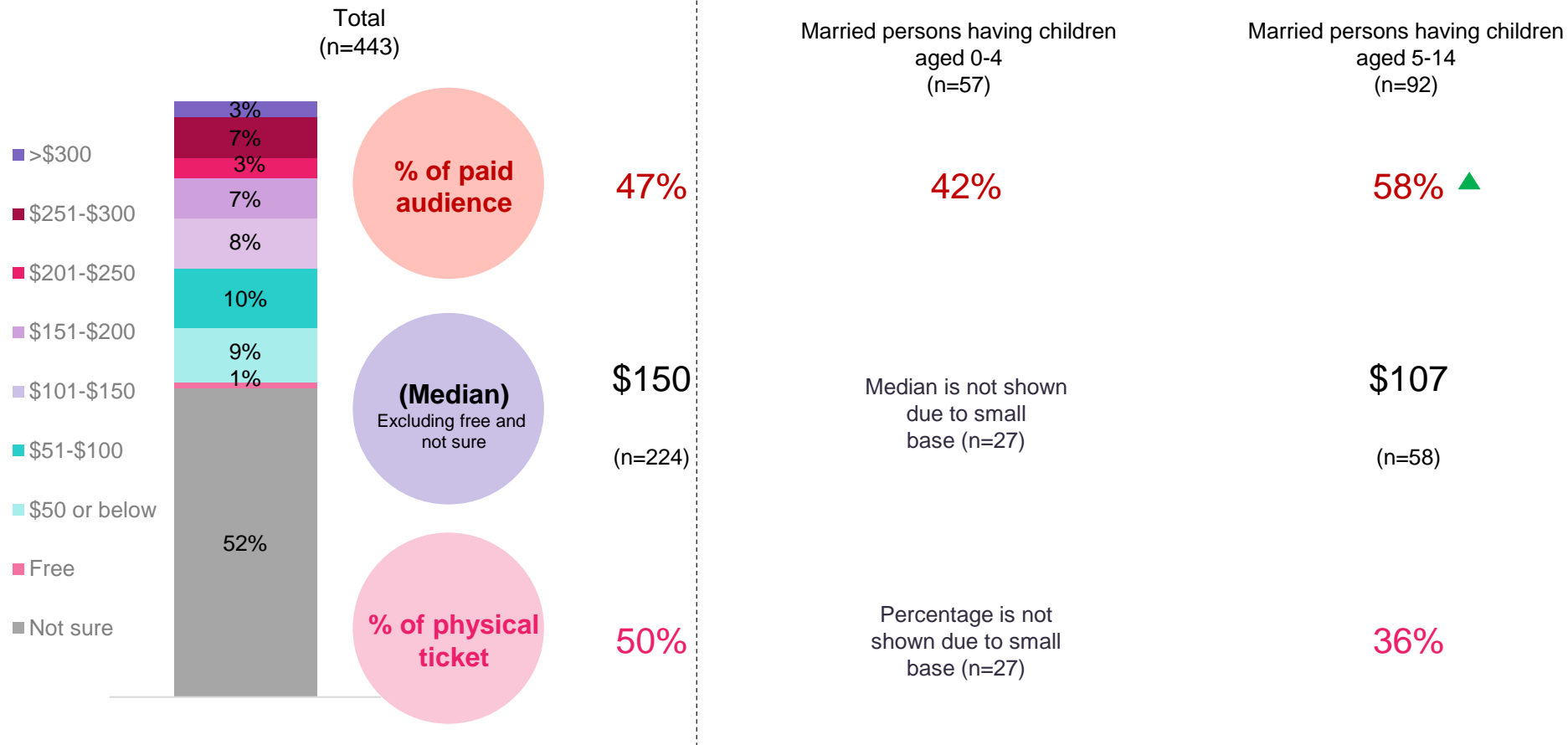
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Acceptable price level for arts participation via alternative modes at post-COVID-19 period – Multi-arts – by life segments

Note to readers: The segment of married persons having children aged 15+ is not shown due to small base (n=21)

Assuming ticket price HKD300 for in-person admission

- Those married persons having children aged 5-14 were more likely to pay for alternative-mode Multi-arts programmes but at a lower price – they expected an alternative-mode programme to be priced almost two-thirds cheaper than a physical one.



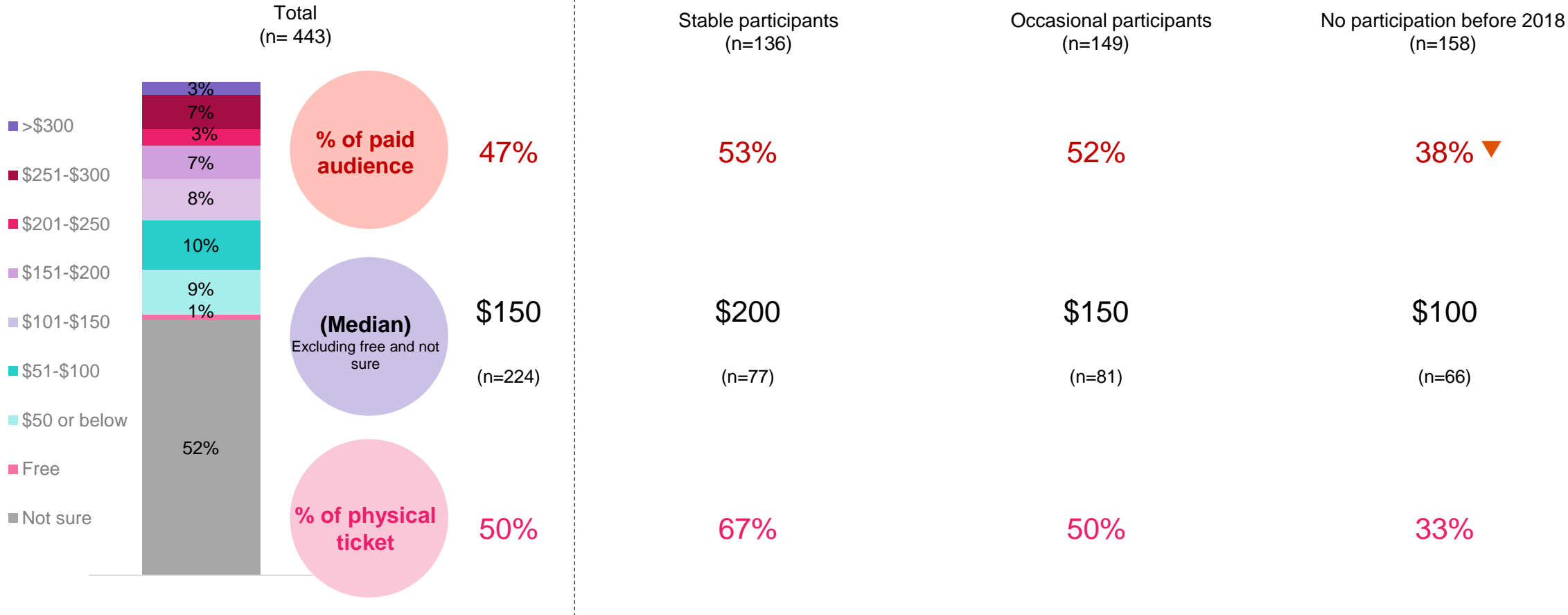
Base: Those consider alternative modes for participating respective art forms at post-COVID-19

▲▼ 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 – Multi-arts – by participation frequency

Assuming ticket price HKD300 for in-person admission

- Compared to occasional participants, although stable participants before less preferred alternative-mode participation (see slide 22 for details), they were willing to pay more for alternative-mode Multi-arts programmes.



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

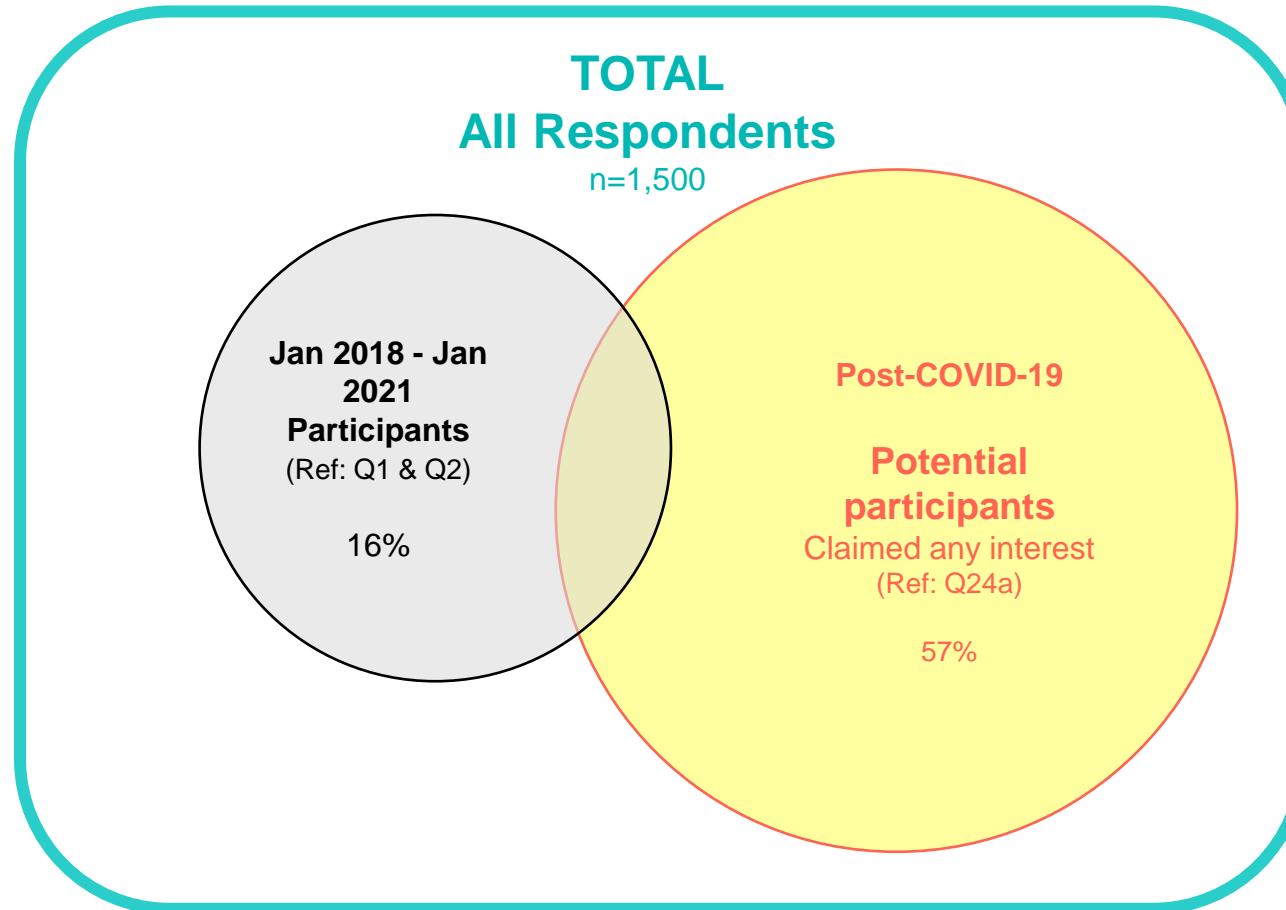
Base: Those consider alternative modes for participating respective art forms at post-COVID-19

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

Profiles of Potential Participants of Multi-arts

Actual participants in Jan 2018 – Jan 2021 and potential participants at post-COVID-19 period – Multi-arts

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



Profiles of potential participants - Multi-arts

- Both actual participants in Jan 2018 – Jan 2021 and potential participants at post-COVID-19 period were skewed towards married persons having children under 18, blue-collar workers and people with higher household income.
- People aged 45-54 also comprised nearly a quarter of potential participants, despite their relatively low participation in Multi-arts in recent years.

	Total (n=1,500)	Participants in Jan 2018 – Jan 2021 (n=231)	Potential participants (n=861)
Gender			
Male	44%	44%	45%
Female	56%	56%	55%
Age Group			
16-24	13%	11%	13%
25-34	20%	36% ▲	22% ▲
35-44	22%	24%	23%
45-54	22%	15% ▼	24% ▲
55-64	23%	14% ▼	18% ▼
Occupation			
Business owners/ Managers and professionals	14%	17%	16% ▲
White-collar	27%	23%	26%
Blue-collar	34%	42% ▲	36% ▲
Housewives	7%	6%	7%
Students	9%	6%	9%
Retirees	3%	3%	2% ▼
Unemployed	5%	3%	3% ▼
Life Segment			
Students	9%	6%	9%
Working singles	22%	24%	23%
Married persons having no children aged <18	24%	11% ▼	18% ▼
Married persons having children aged <18	32%	45% ▲	38% ▲
Education Level			
Secondary or below	45%	43%	40% ▼
Post-secondary / University	55%	57%	60% ▲
Monthly Household Income			
Below HKD 30,000	64%	53% ▼	59% ▼
HKD 30,000 - 49,999	24%	32% ▲	27% ▲
More than HKD 50,000	12%	15%	14% ▲

	Total (n=1,500)	Participants in Jan 2018 – Jan 2021 (n=231)	Potential participants (n=861)
Region & living district			
Hong Kong Island	17%	19%	17%
Central & Western	3%	3%	4%
Eastern	8%	11%	7%
Southern	4%	4%	3%
Wan Chai	2%	2%	2%
Kowloon	30%	31%	32% ▲
Kowloon City	6%	5%	6%
Kwun Tong	8%	8%	9%
Sham Shui Po	6%	6%	7%
Wong Tai Sin	6%	5%	6%
Yau Tsim Mong	4%	6%	5%
New Territories	53%	49%	51%
Kwai Tsing	7%	9%	6%
North	5%	3%	5%
Sai Kung	7%	4%	7%
Sha Tin	8%	8%	8%
Tai Po	4%	4%	4%
Tsuen Wan	4%	3%	4%
Tuen Mun	8%	8%	7%
Yuen Long	8%	4% ▼	8%
Islands	3%	6% ▲	4% ▲

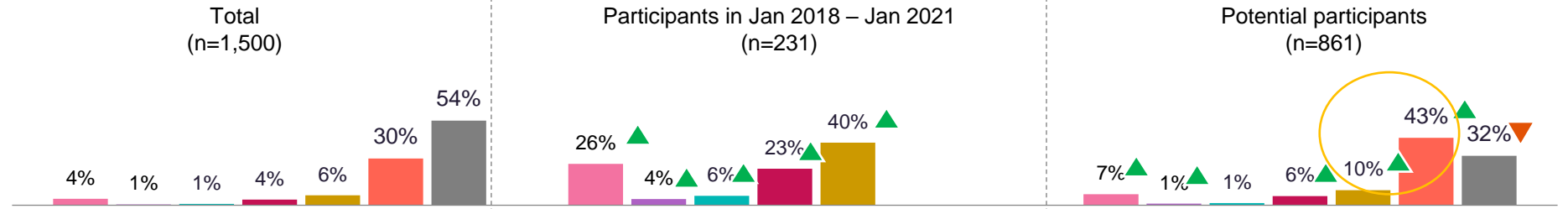
▲▼ Denote the figure of the segment is significantly higher/ lower than the total

Profiles of potential participants - Multi-arts - by mode of participation

- Over half of the potential participants were lapsed participants, meaning that they were still interested in Multi-arts despite their non-participation in this art form recently. (See slides 44-45 for reasons of non-participation of these lapsed participants)

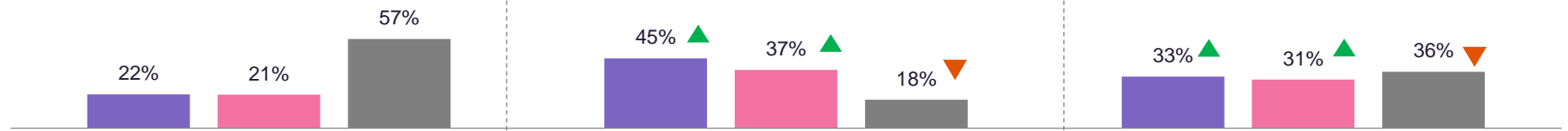
Distribution of segments

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



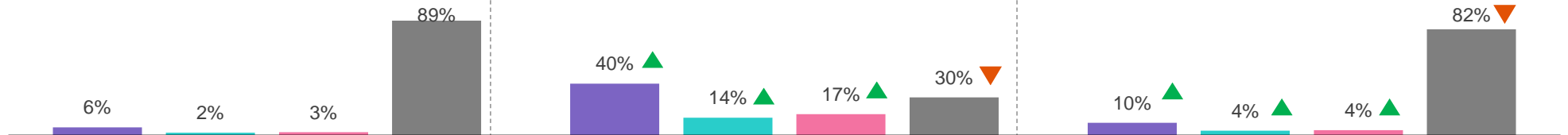
Participation before 2018

- Stable participation
- Occasional participation
- No participation



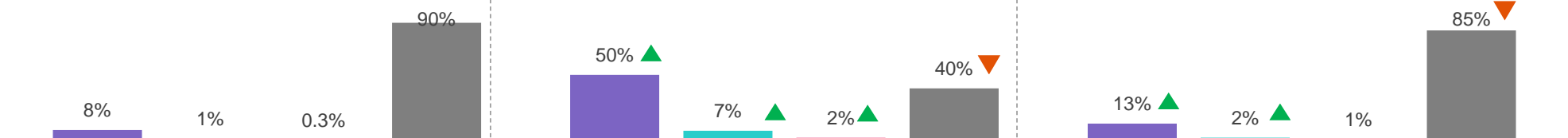
Mode of participation in 2018 – 2019

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



Mode of participation during COVID-19

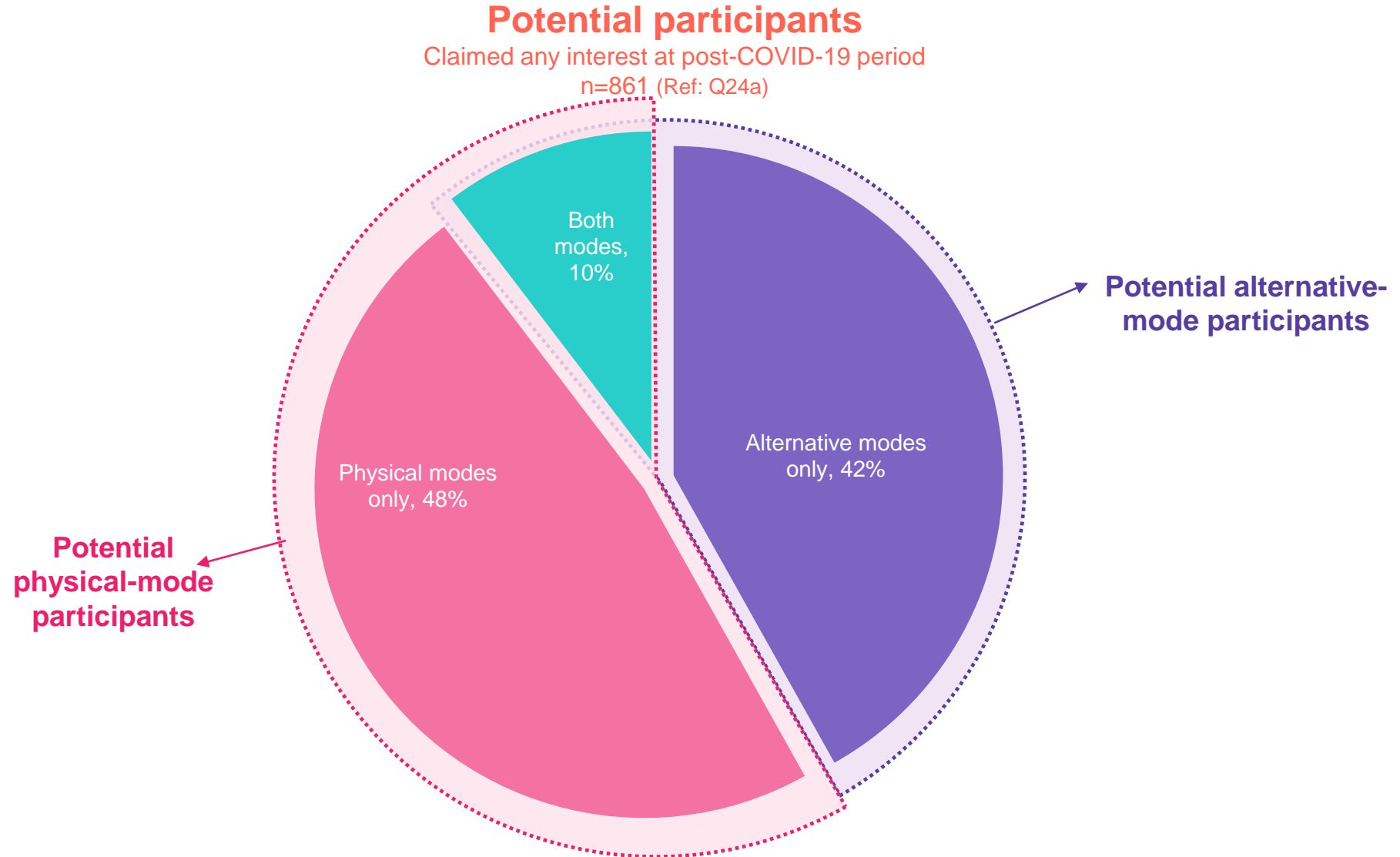
- Alternative modes only
- Both physical AND alternative modes
- Physical modes only
- No participation



Profile of Potential Participants – by Mode of Participation

Distribution of potential participants by mode preference – Multi-arts

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



Profiles of potential participants – Multi-arts – by mode of participation

- Potential physical-mode participants were more skewed towards married persons having children under the age of 18; whereas among potential alternative-mode participants, there was a higher proportion of housewives and people with lower household income.

	Potential participants (n=861)	Potential physical-mode participants (n=519)	Potential alternative-mode participants (n=443)
Gender			
Male	45%	45%	43%
Female	55%	55%	57%
Age Group			
16-24	13%	13%	12%
25-34	22%	23%	23%
35-44	23%	24%	21%
45-54	24%	24%	25%
55-64	18%	16%	19%
Occupation			
Business owners/ Managers and professionals	16%	19%	15%
White-collar	26%	28%	26%
Blue-collar	36%	35%	37%
Housewives	7%	4% ▼	8%
Students	9%	9%	8%
Retirees	2%	3%	3%
Unemployed	3%	3%	3%
Life Segment			
Students	9%	9%	8%
Working singles	23%	22%	25%
Married persons having no children aged <18	18%	18%	18%
Married persons having children aged <18	38%	41%	33%
Education Level			
Secondary or below	40%	36%	42%
Post-secondary / University	60%	64%	58%
Monthly Household Income			
Below HKD 30,000	59%	56%	65%
HKD 30,000 - 49,999	27%	28%	23%
More than HKD 50,000	14%	16%	13%

	Potential participants (n=861)	Potential physical-mode participants (n=519)	Potential alternative-mode participants (n=443)
Region & living district			
Hong Kong Island	17%	19%	14%
Central & Western	4%	6%	2% ▼
Eastern	7%	8%	7%
Southern	3%	4%	3%
Wan Chai	2%	2%	2%
Kowloon	32%	33%	33%
Kowloon City	6%	7%	4%
Kwun Tong	9%	9%	9%
Sham Shui Po	7%	7%	8%
Wong Tai Sin	6%	5%	6%
Yau Tsim Mong	5%	5%	6%
New Territories	51%	48%	53%
Kwai Tsing	6%	6%	5%
North	5%	4%	5%
Sai Kung	7%	7%	6%
Sha Tin	8%	8%	9%
Tai Po	4%	3%	5%
Tsuen Wan	4%	4%	3%
Tuen Mun	7%	7%	7%
Yuen Long	8%	8%	8%
Islands	4%	2%	5%

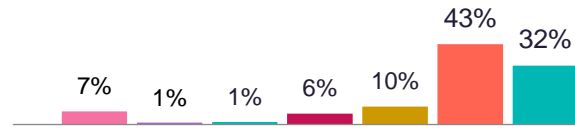
Profiles of potential participants – Multi-arts – by mode of participation

- Compared to potential alternative-mode participants, more potential physical-mode participants only participated in person in 2018-2019, which might explain why more of them had lapsed since COVID-19 when physical-mode programmes were less readily available.
- There was a higher percentage of stable participants before 2018 among potential physical-mode participants than among their alternative-mode counterparts.

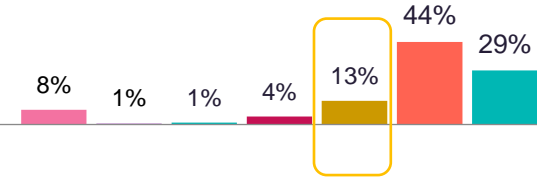
Distribution of segments

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

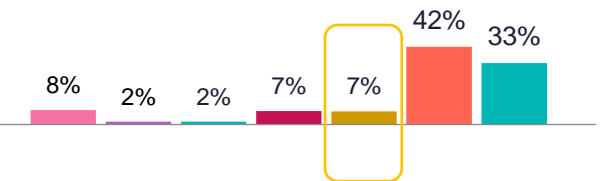
Potential participants (n=861)



Potential physical-mode participants (n=519)

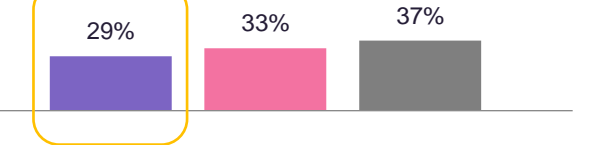
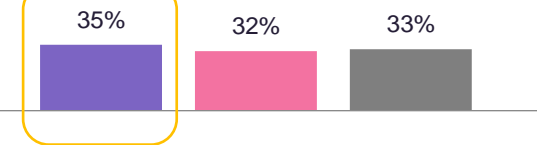
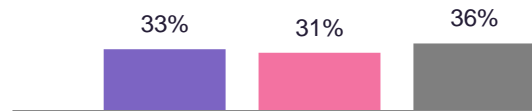


Potential alternative-mode participants (n=443)



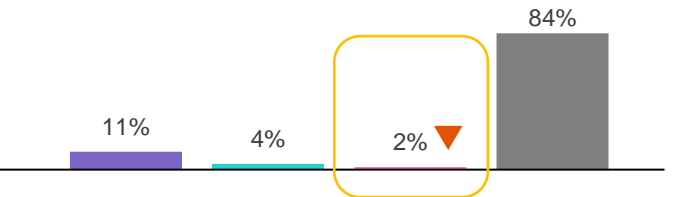
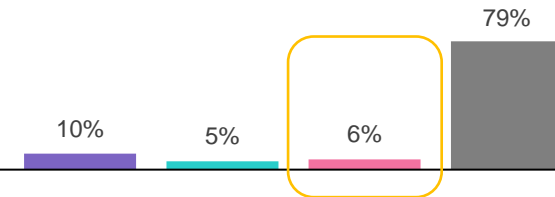
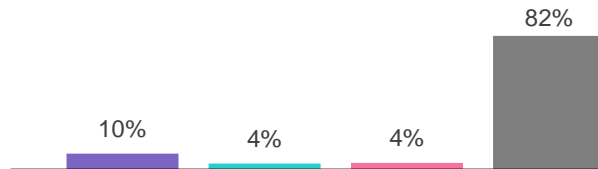
Participation before 2018

- Stable participation
- Occasional participation
- No participation



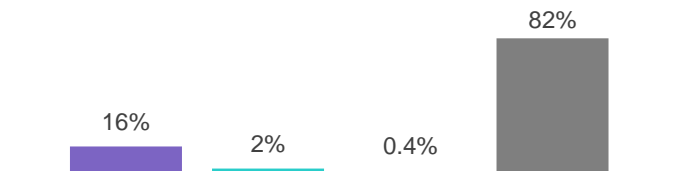
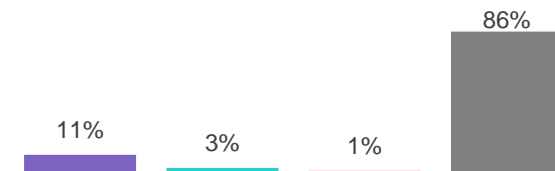
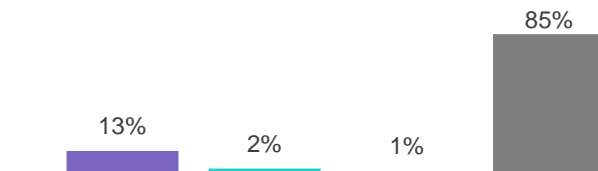
Mode of participation in 2018 – 2019

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



Mode of participation during COVID-19

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

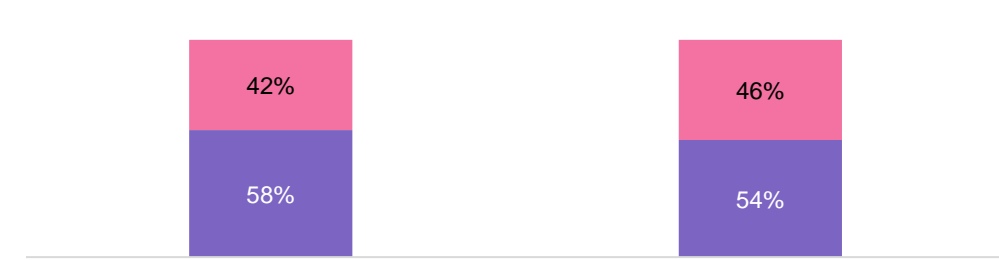
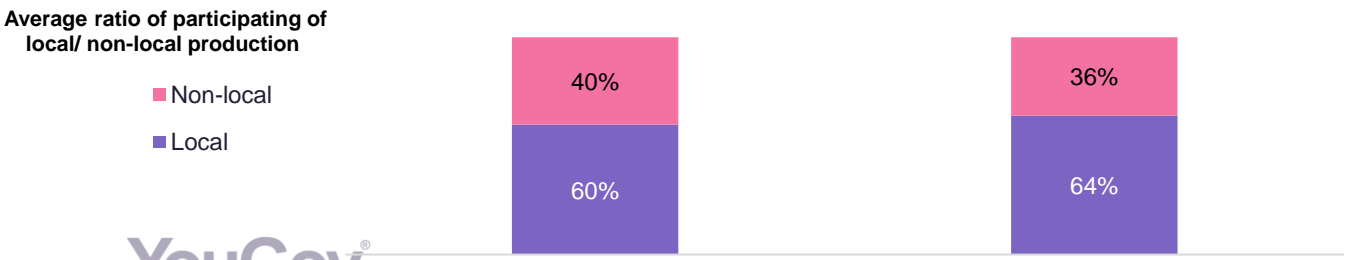
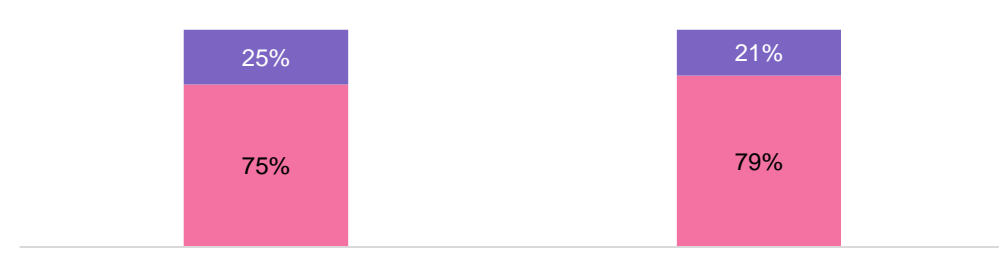
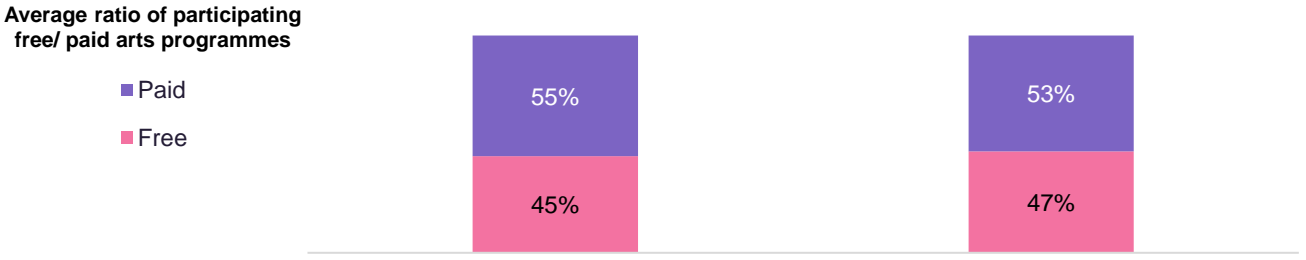
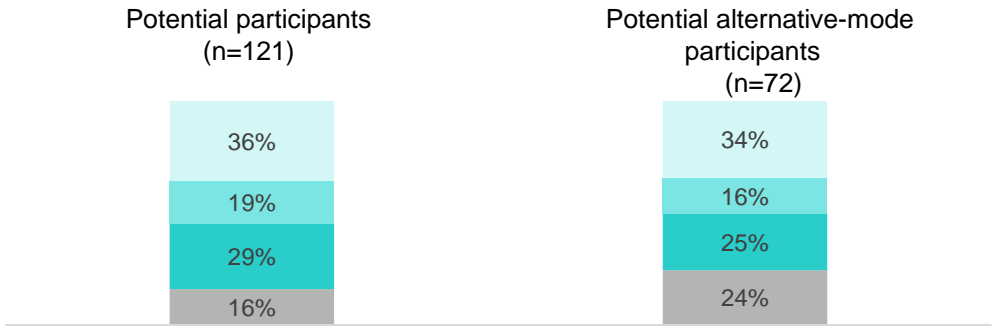
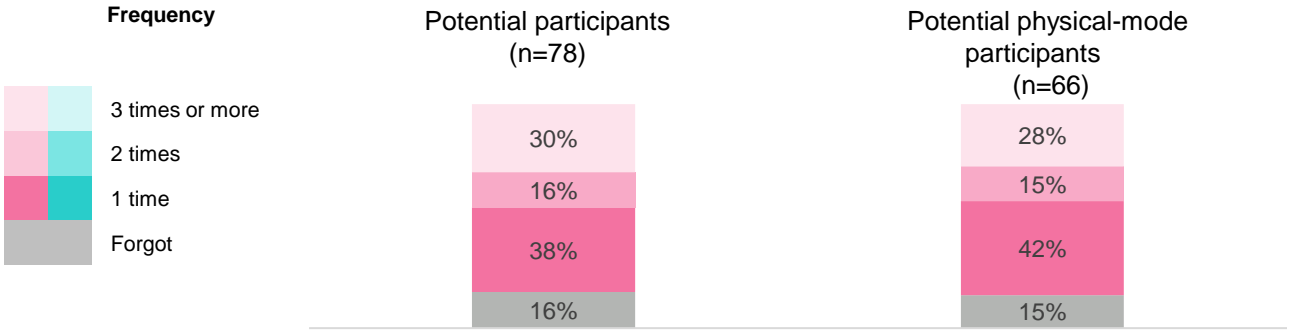


Profiles of potential participants – Multi-arts – by mode of participation

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

Participation via physical modes in 2018-2019

Participation via alternative modes during COVID-19



Note: "Participation via physical modes in 2018-2019" includes physical-mode participants in 2018-2019 only, so the bases here do not cover all potential participants.
 "Participation via alternative modes during COVID-19" includes alternative-mode participants during COVID-19 only, so the bases here do not cover all potential participants.
 Note: For participation frequency, respondents are asked for their average yearly participation via physical modes in 2018-2019, and their total participation via alternative modes during COVID-19.

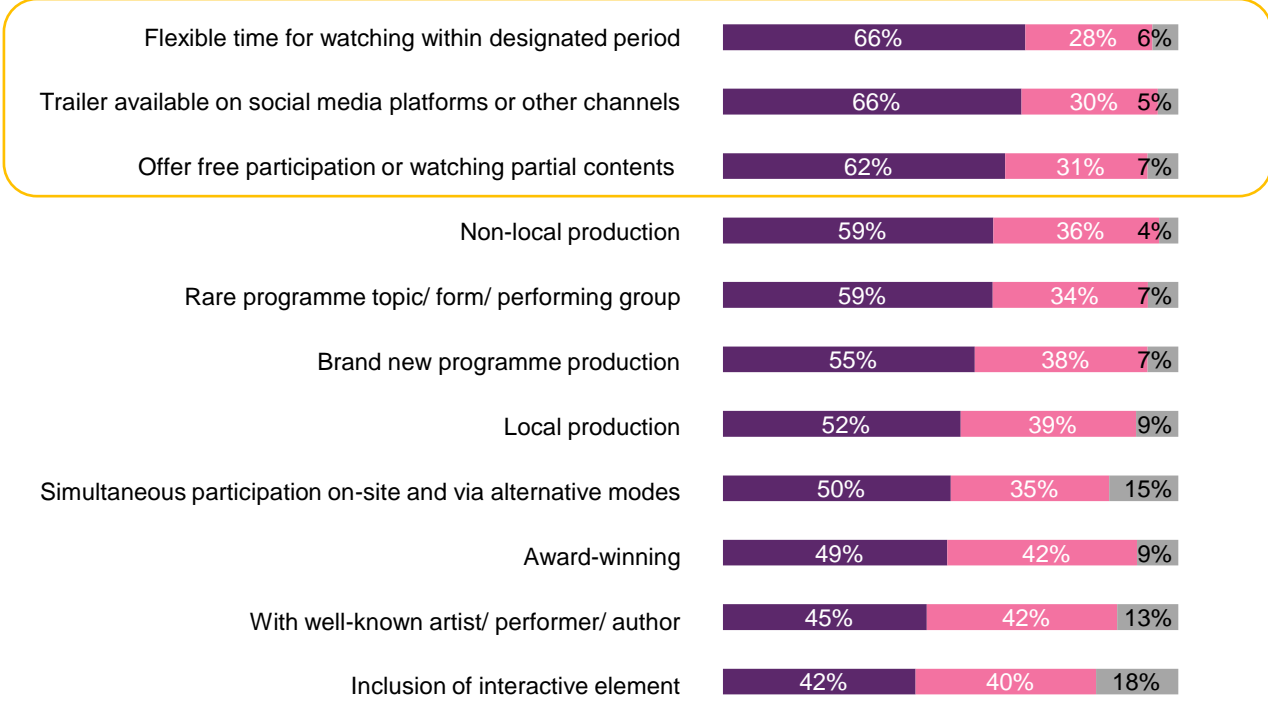
Profiles of potential participants – Multi-arts – important elements and information source for alternative modes

- Flexible show time, trailers on social media platforms/ other channels and free participation were the 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

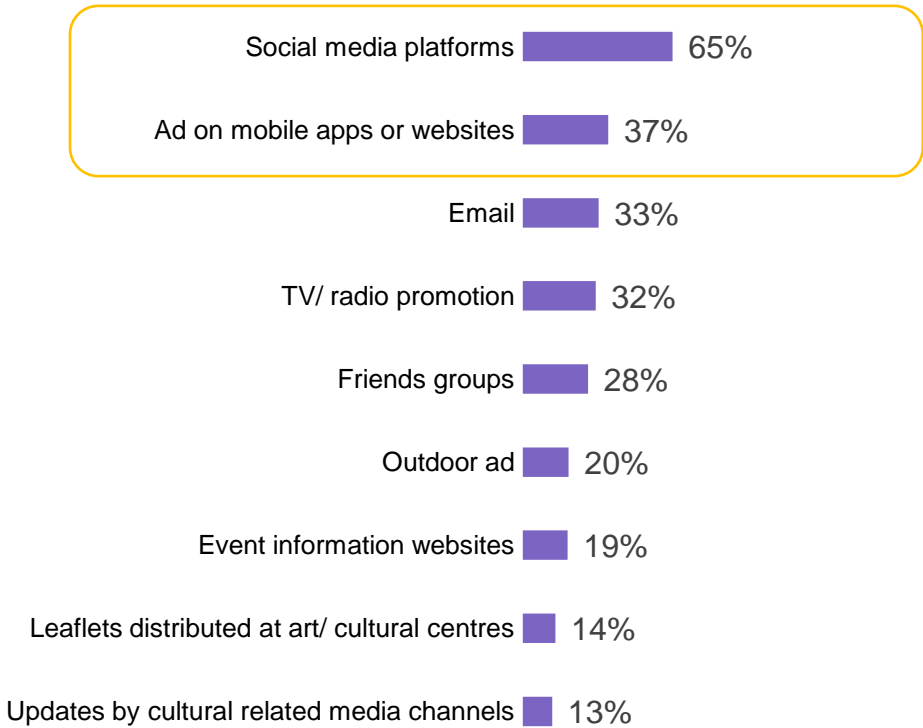
Potential alternative-mode participants (n=443)

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



Information source for alternative modes during COVID-19

Potential alternative-mode participants (n=405)

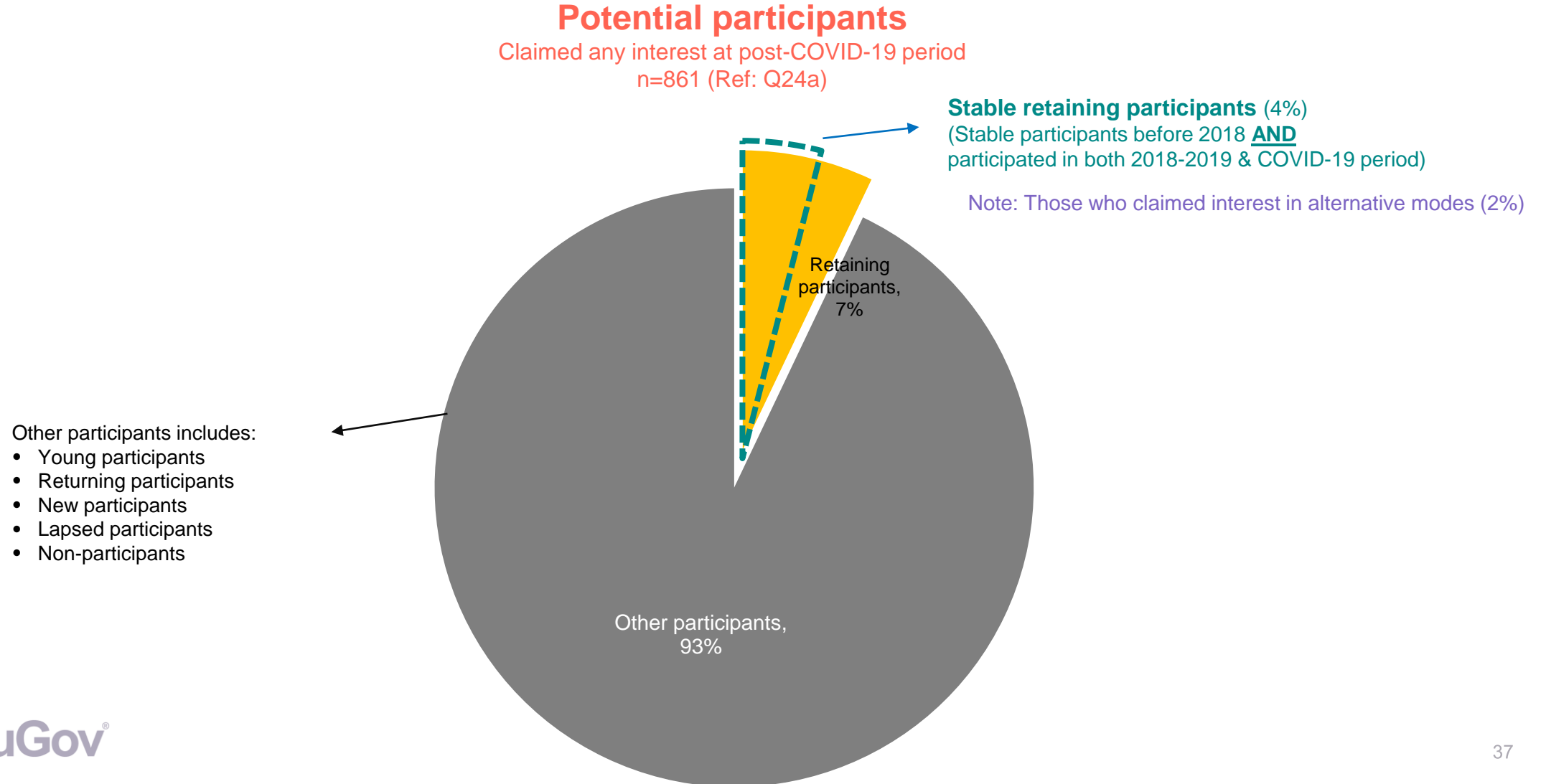


Note: For information source, respondents without awareness of or prior experience in alternative programmes are excluded, so the base does not cover all potential alternative-mode participants.

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

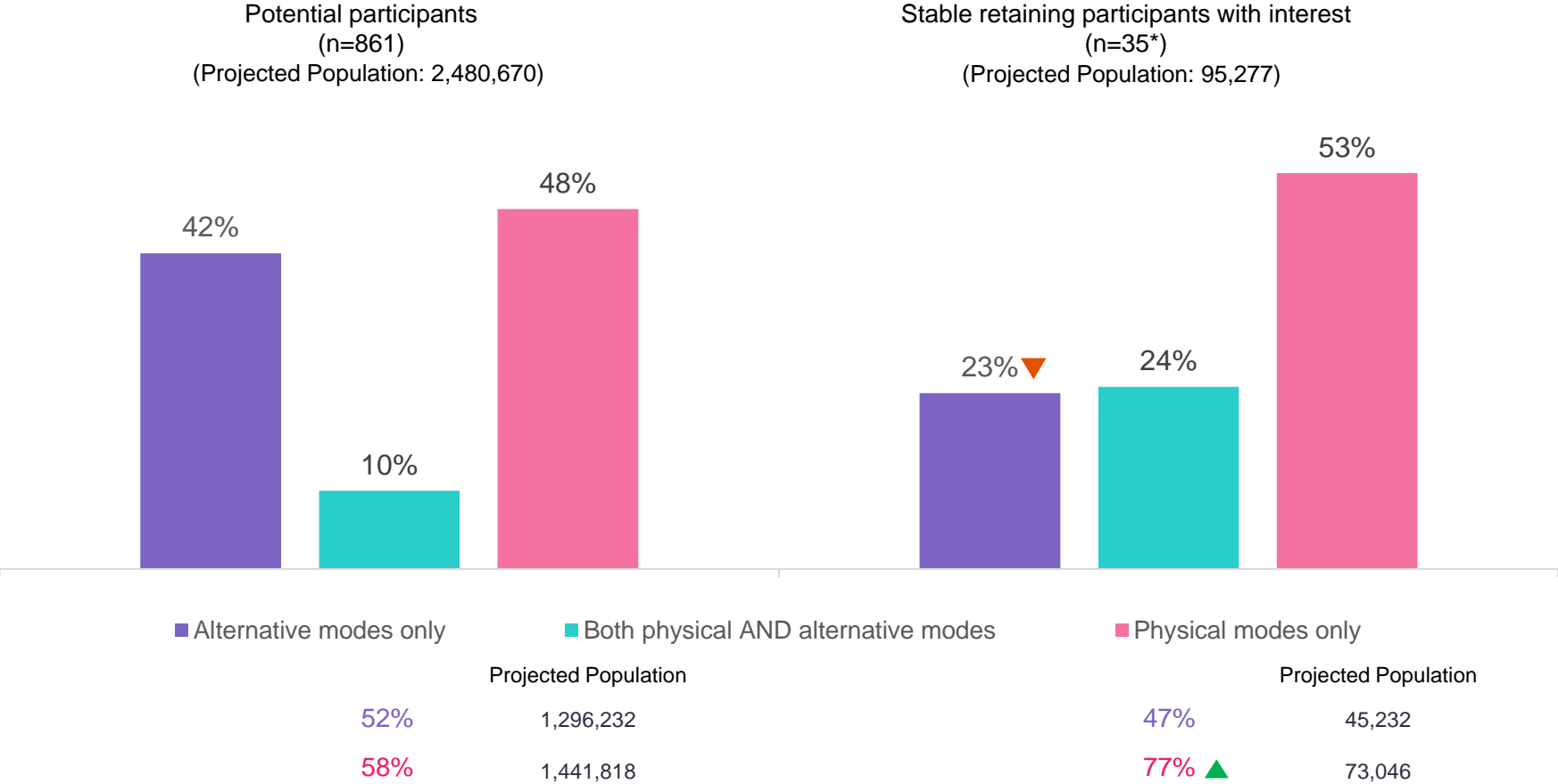
Proportion of stable retaining participation with interest among potential participants – Multi-arts

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



Stable retaining participants with participation interest at post-COVID-19 period – Multi-arts

- Compared to all potential participants, stable retaining participants with interest in post-COVID-19 participation shown greater preference for physical-mode Multi-arts programmes.



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

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

Profiles of stable retaining participants with participation interest at post-COVID-19 period – Multi-arts

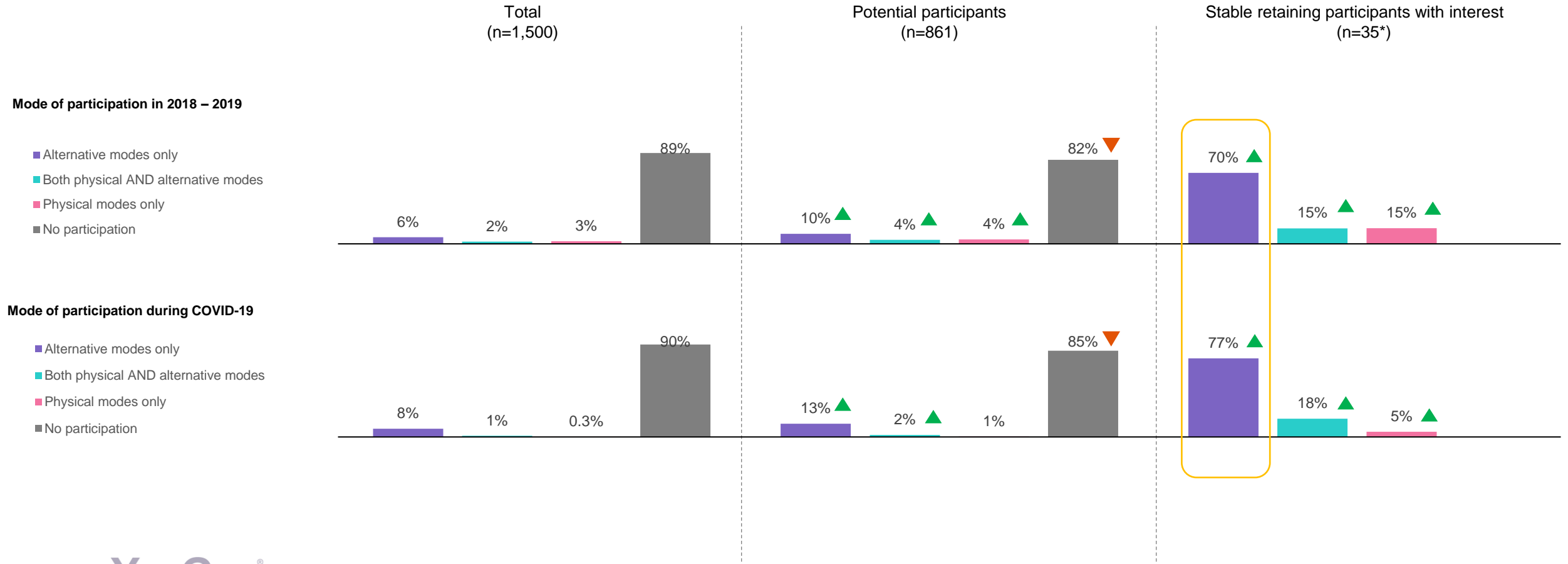
- Stable retaining participants with interest were skewed towards people aged 25-34 and with higher education attainment. They comprised a relatively high percentage of business owners/ managers and professionals, and tended to be married persons having young children.

	Total (n=1,500)	Potential participants (n=861)	Stable retaining participants with interest (n=35*)
Gender			
Male	44%	45%	45%
Female	56%	55%	55%
Age Group			
16-24	13%	13%	9%
25-34	20%	22% ▲	42% ▲
35-44	22%	23%	24%
45-54	22%	24% ▲	19%
55-64	23%	18% ▼	6% ▼
Occupation			
Business owners/ Managers and professionals	14%	16% ▲	31% ▲
White-collar	27%	26%	22%
Blue-collar	34%	36% ▲	33%
Housewives	7%	7%	-
Students	9%	9%	6%
Retirees	3%	2% ▼	7%
Unemployed	5%	3% ▼	-
Life Segment			
Students	9%	9%	6%
Working singles	22%	23%	20%
Married persons having no children aged <18	24%	18% ▼	13%
Married persons having children aged <18	32%	38% ▲	54% ▲
Education Level			
Secondary or below	45%	40% ▼	25% ▼
Post-secondary / University	55%	60% ▲	75% ▲
Monthly Household Income			
Below HKD 30,000	64%	59% ▼	56%
HKD 30,000 - 49,999	24%	27% ▲	24%
More than HKD 50,000	12%	14% ▲	20%

	Total (n=1,500)	Potential participants (n=861)	Stable retaining participants with interest (n=35*)
Region & living district			
Hong Kong Island	17%	17%	31% ▲
Central & Western	3%	4%	7%
Eastern	8%	7%	19% ▲
Southern	4%	3%	5%
Wan Chai	2%	2%	0%
Kowloon	30%	32% ▲	19%
Kowloon City	6%	6%	5%
Kwun Tong	8%	9%	4%
Sham Shui Po	6%	7%	0%
Wong Tai Sin	6%	6%	7%
Yau Tsim Mong	4%	5%	3%
New Territories	53%	51%	50%
Kwai Tsing	7%	6%	11%
North	5%	5%	7%
Sai Kung	7%	7%	8%
Sha Tin	8%	8%	5%
Tai Po	4%	4%	8%
Tsuen Wan	4%	4%	0%
Tuen Mun	8%	7%	8%
Yuen Long	8%	8%	2%
Islands	3%	4% ▲	0%

Profiles of stable retaining participants with participation interest at post-COVID-19 period – Multi-arts

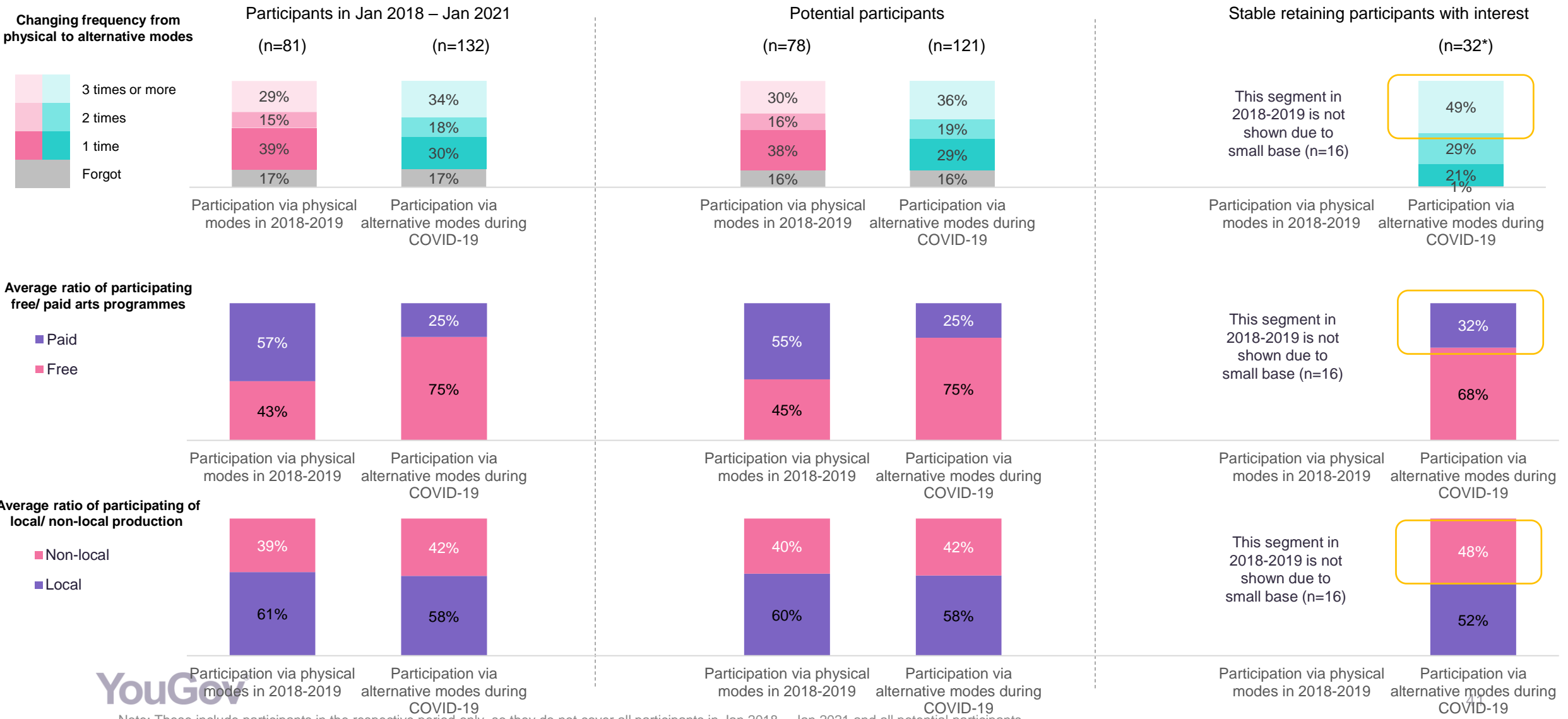
- An extremely strong participation in alternative-mode programmes was seen among the stable retaining participants with interest. Even before the COVID-19 outbreak, 70% of them had participated in alternative modes only.



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

Profiles of stable retaining participants with participation interest at post-COVID-19 period – Multi-arts

- Nearly half of stable retaining participants with interest participated in alternative-mode Multi-arts programmes more than 3 times during COVID-19. They also attended more paid and non-local productions in alternative modes than other past participants.



Note: These include participants in the respective period only, so they do not cover all participants in Jan 2018 – Jan 2021 and all potential participants.
 Note: For participation frequency, respondents are asked for their average yearly participation via physical modes in 2018-2019, and their total participation via alternative modes during COVID-19.
 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=18).

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

Distribution of potential participants by type of participants – Multi-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=861 (Ref: Q24a)

Other participants includes:

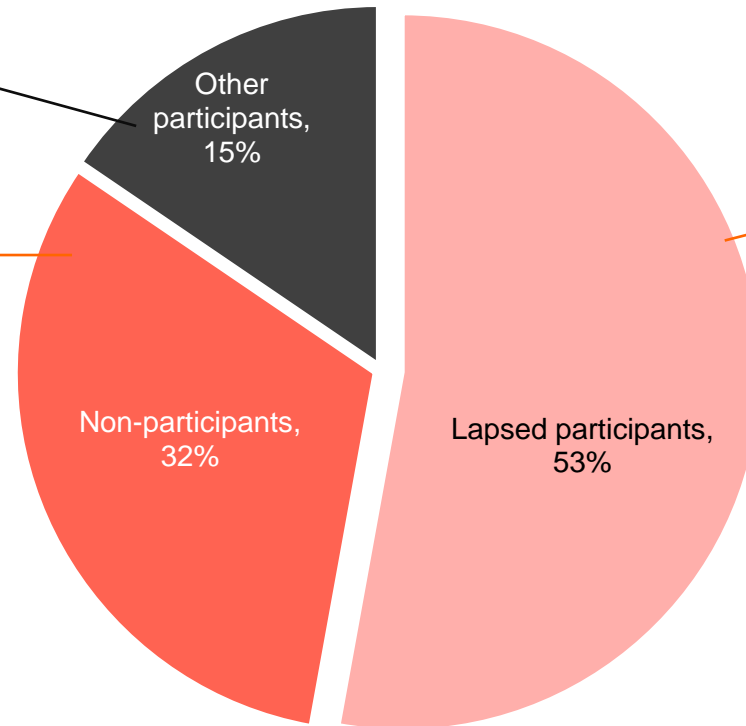
- Retaining participants
- Young participants
- Returning participants
- New participants

Those who claimed interest in

- Physical modes (17%)
- Alternative modes (17%)

Those who claimed interest in

- Physical modes (33%)
- Alternative modes (26%)



Other observations:

	Potential physical-mode participants	Non-participants with interest in physical modes
Female	55%	66%
Aged 25-34	23%	15%
Aged 45-54	24%	30%
Married persons having no children aged <18	18%	22%
Married persons having children aged <18	41%	29%

	Potential alternative-mode participants	Non-participants with interest in alternative modes
Working singles	25%	32%
Married persons having no children aged <18	18%	26%
Married persons having children aged <18	33%	23%
MHI below HKD 30,000	65%	75%

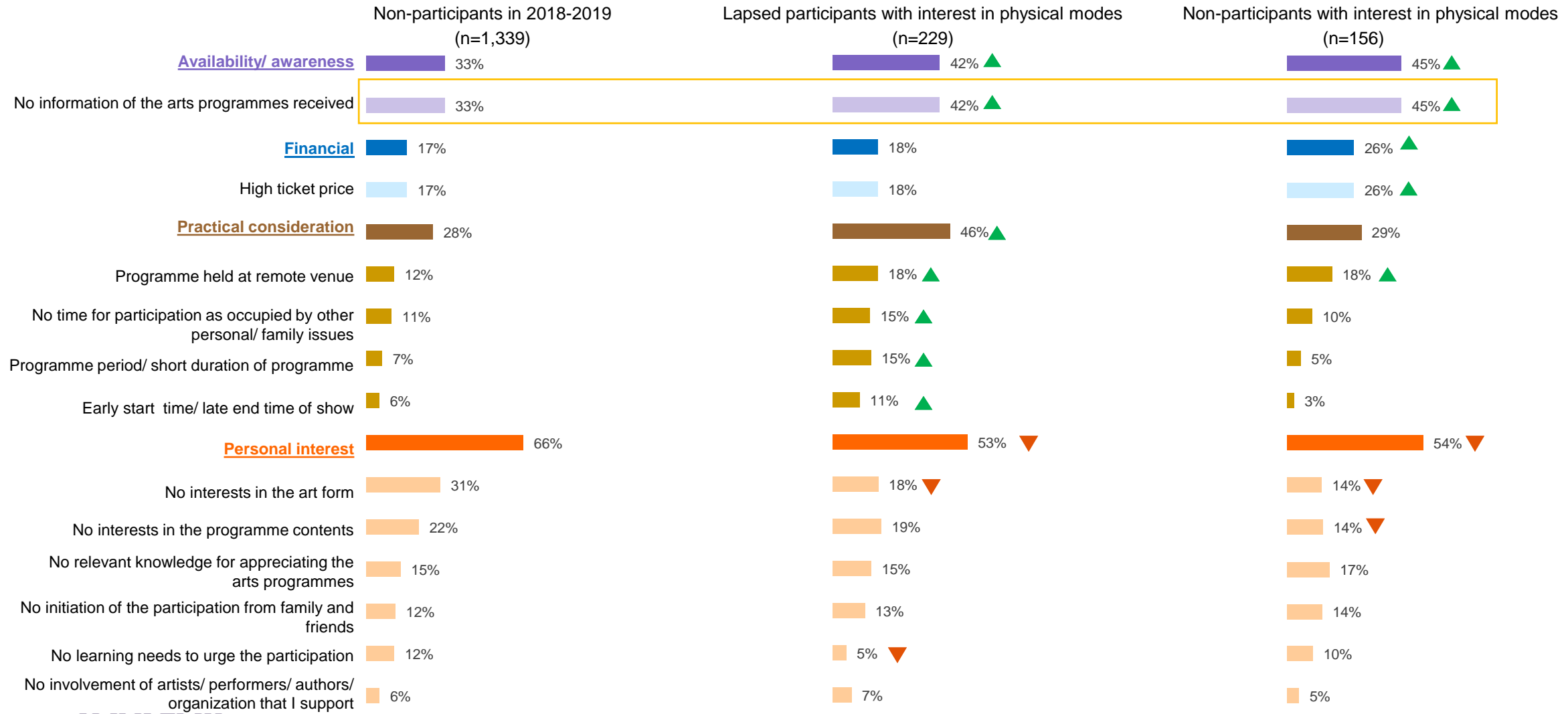
Other observations:

	Potential physical-mode participants	Lapsed participants with interest in physical modes
Male	45%	51%

	Potential alternative-mode participants	Lapsed participants with interest in alternative modes
Working Singles	25%	19%
Married persons having children aged <18	33%	37%

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

- Lack of programme information was the main barrier for lapsed participants and non-participants in 2018-2019 despite their interest in Multi-arts.
- More than a quarter of non-participants with interest in physical programmes suggested that the high ticket price had deterred them from participation.



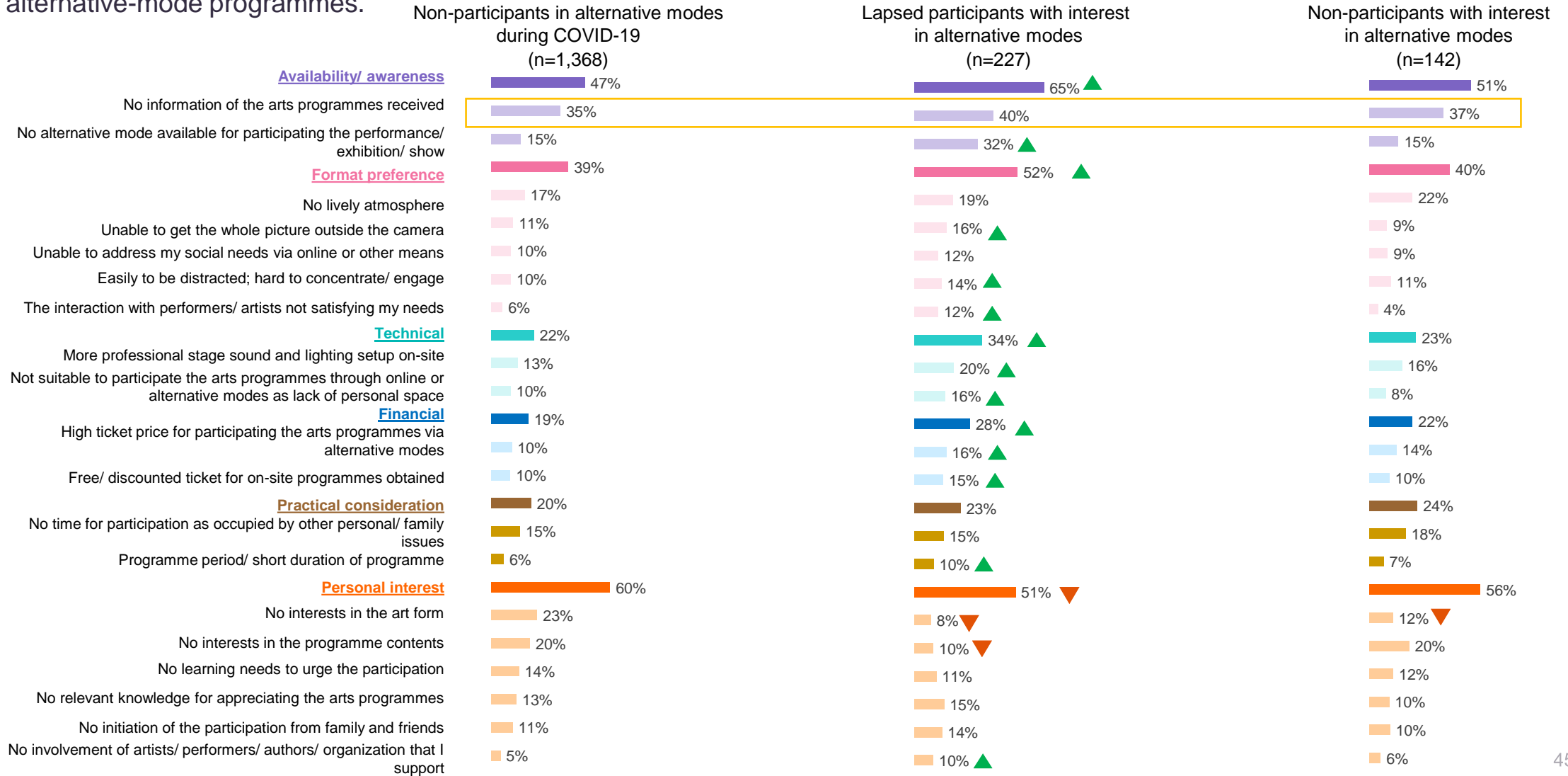
Note: Lapsed participants who have participated in 2018-2019 are excluded from this question, so not all lapsed participants with interest are covered here.
 Base: Non-participants of Multi-arts programme in 2018-2019

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

 Top reason

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

- Lack of information remained the major barrier for interested lapsed and non-participants during COVID-19.
- More than one-third of lapsed participants with claimed interest in alternative modes also expressed concerns with the technical or format issues in alternative-mode programmes.



Top reason

Base: Non-participants of Multi-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 – Multi-arts

- Non-participants would in general be more willing to participate in alternative modes even when physical participation was available, but they expected greater discount for alternative-mode programmes than other potential participants.

