


A photograph showing three individuals in a dark setting, focused on a complex art installation. The installation features several large, vintage-style electric fans, some of which are interconnected with a network of wires and electronic components. One person on the left is adjusting a fan, while the other two are leaning over the central part of the installation, possibly connecting or fine-tuning the wiring. The scene is lit with a warm, golden light, highlighting the textures of the fans and the concentration of the participants.

HKADC Behavioural Study on Arts Participants - Individual Art Form (Multi-arts)



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Notes to readers

- For simplicity, “2018-2019” denotes the 2 years before the outbreak of COVID-19 and “2020” denotes the period during the pandemic from Jan 2020 to Jan 2021 (the time of survey fieldwork in stage 1 study).
- Expenditure on arts participation through alternative modes was only tracked in 2022’s study, and as a result, comparisons versus previous waves are not available.
- Reported results were weighted to ensure the sample is representative of the Hong Kong population.
- Due to rounding, the percentages might not add up to total.

Sub-categories included in Multi-arts

- Any arts activities that integrate two or more art forms, e.g. a Drama performance with Electronic Music and Video Projection, or programmes with elements of Magic Performance, Juggling/Circus, Sand Painting, Video Projection, Figure Skating, etc.



Notation

denotes small base ($n < 30$)

denotes very small base ($n < 10$)

- denotes a figure of 0%

* denotes a figure that is larger than 0% but less than 0.5%

  green/ red boxes highlight figures that were notably different from other subgroups’/other categories’ results

 black dotted boxes highlight figures that were notably different from past waves’ results

Multi-arts

6% Multi-arts participation

Waning participation was observed in Multi-arts as only 6%, or a projected population of 0.3 million aged 15-74, participated in Multi-arts activities during Jul'21-Jul'22 (-4% since 2020; -5% since 2018-19).

3% in physical mode

3%, or a projected population of 163 thousand aged 15-74, attended Multi-arts activities through physical mode during Jul'21-Jul'22, which represented a drop of 3% since 2014/15. However, attendance frequency among Multi-arts participants had improved to 3.8 activities per person (from 2.3 in 2014/15).

5% in alternative modes

A more substantial drop in viewership was observed through alternative modes participation, as 5%, or a projected population of 275 thousand aged 15-74, reported attending Multi-arts activities (-5% since 2020). Viewership frequency also faltered, dropping to 5.1 activities per person (from 7.9 in 2018-19).



Overview of incidence, projected population and expenditure – Multi-arts

- Participation in Multi-Arts faltered over the past few years through both physical and alternative modes. As a result, expenditure had dropped substantially since 2014/15.
- As a whole, Multi-arts was a relatively less common art form as only about 1 in 20 consumers had attended Multi-arts activities from Jul'21 to Jul'22.

6%

Participated in Multi-arts from Jul'21 to Jul'22

0.3M

Projected population of Multi-arts participants

- **Physical mode: 3% (163k)**
 - 2020: 2% (+1%)
 - 2018-2019: 5% (-2%)
 - 2014/15: 6% (-3%)
- **Alternative modes: 5% (275k)**
 - 2020: 9% (-5%)
 - 2018-2019: 9% (-4%)

\$154M

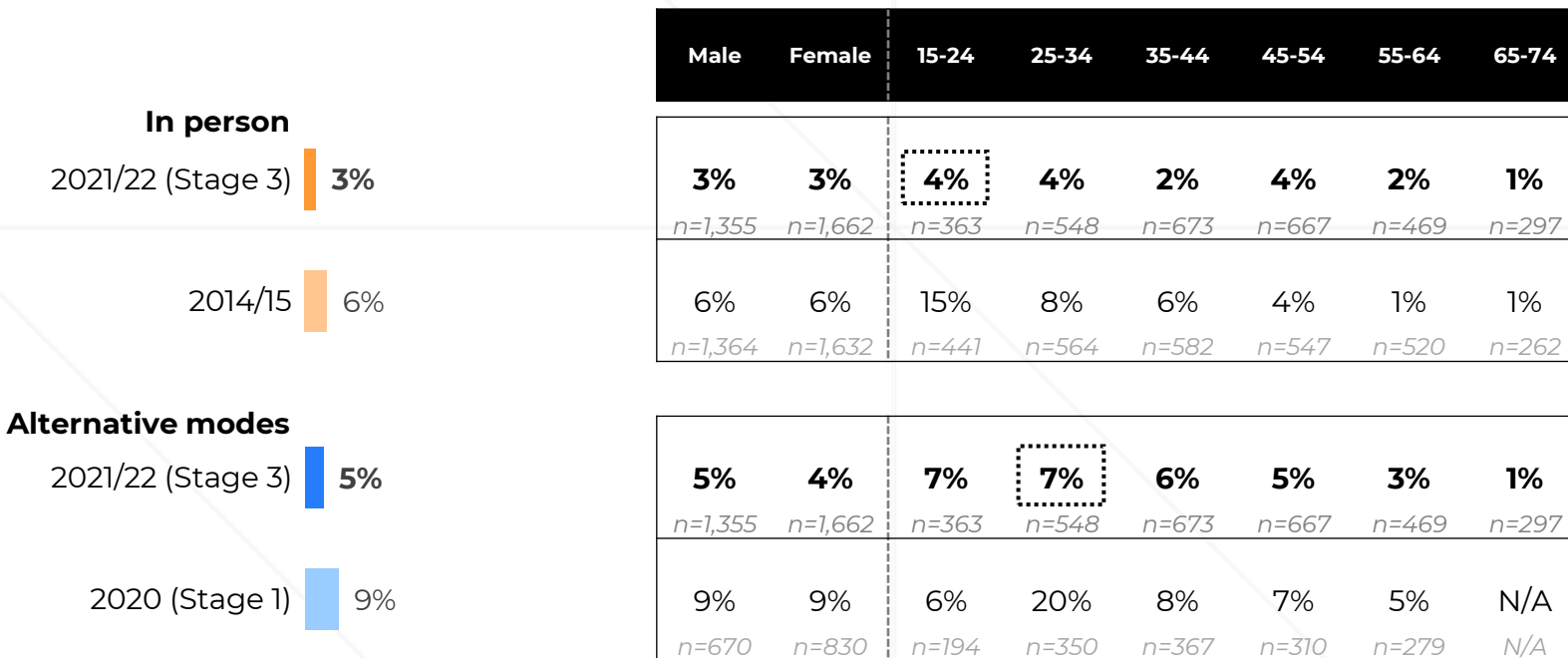
Expenditure in Multi-arts

- Physical mode: \$87M
 - 2014/15: 150M (-\$63M)
- Alternative modes: \$68M
 - 44% of total expenditure

Participation mode of Multi-arts participants – by gender and age

(among all respondents)

- Attendance of Multi-arts activities through both physical and alternative modes dropped across most segments, compared to surveys in 2014/15 and 2020 respectively, especially among those aged 15-24 in terms of physical mode and those aged 24-34 with regard to alternative modes.



Source: Q106a

Base: All respondents (n=3,017)

Note: In stage 1 survey, the respondents were HK residents aged 15-64. Results of 2020 only include those aged 16-64.

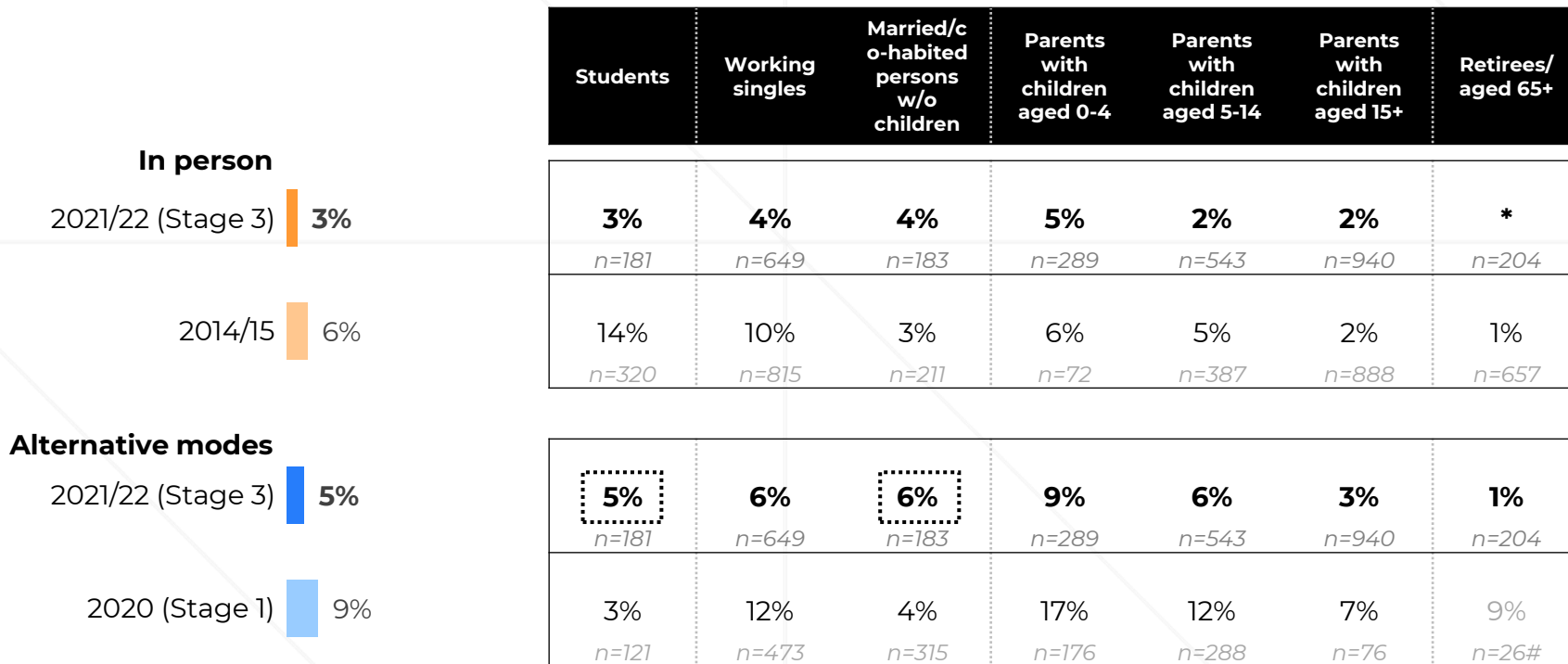
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⋮ black dotted boxes highlight figures that were notably different to past waves' results

Participation mode of Multi-arts participants – by life segment

(among all respondents)

- By life segment, although slightly more students and Married persons without children have watched Multi-arts performances through alternative modes since 2020, participation for most other segments dropped across physical mode since 2014/15 and alternative modes since 2020.



Source: Q106a

denotes small base (*n*<30)

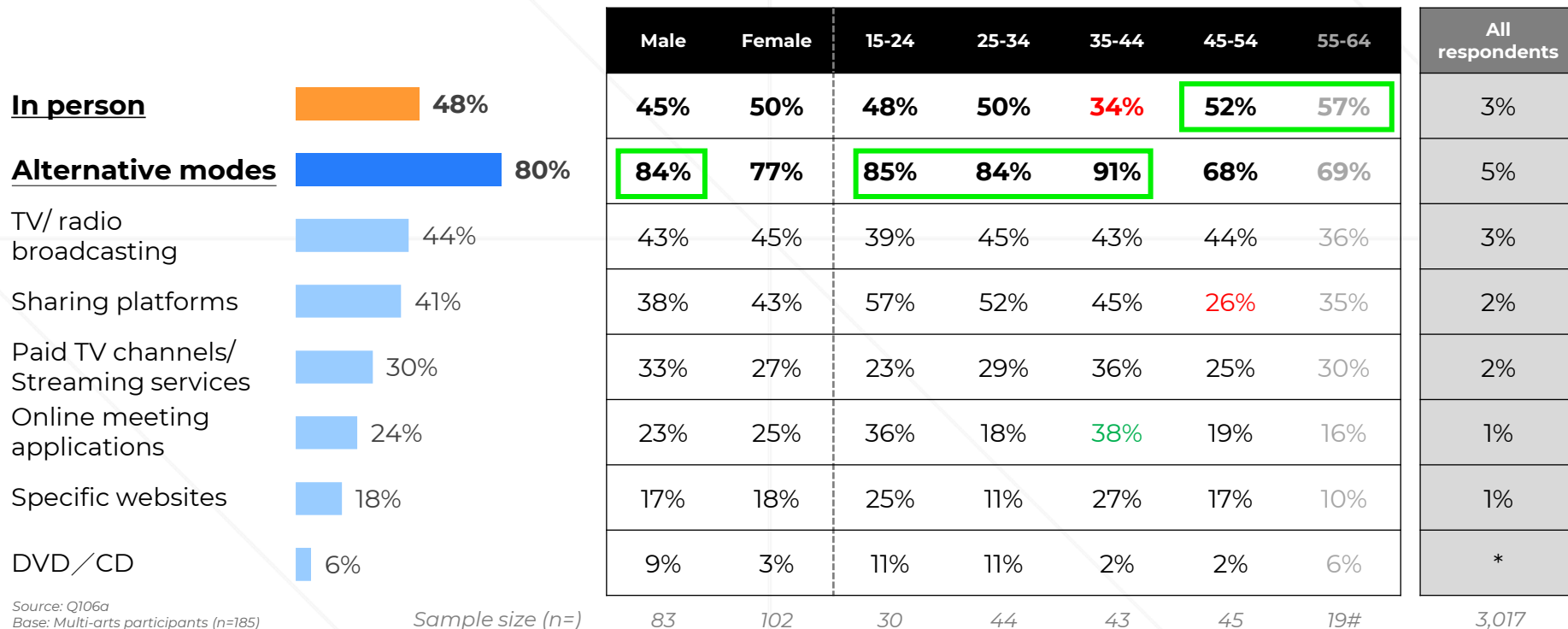
Base: All respondents (*n*=3,017)

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▣ black dotted boxes highlight figures that were notably different to past waves' results

Participation mode among Multi-arts participants – by gender and age

- Males and younger participants aged 15-44 were more likely to view Multi-arts programmes through alternative modes, whereas older consumers aged 45-54 were relatively more likely to view in person.



Source: Q106a
Base: Multi-arts participants (n=185)
denotes small base (n<30)

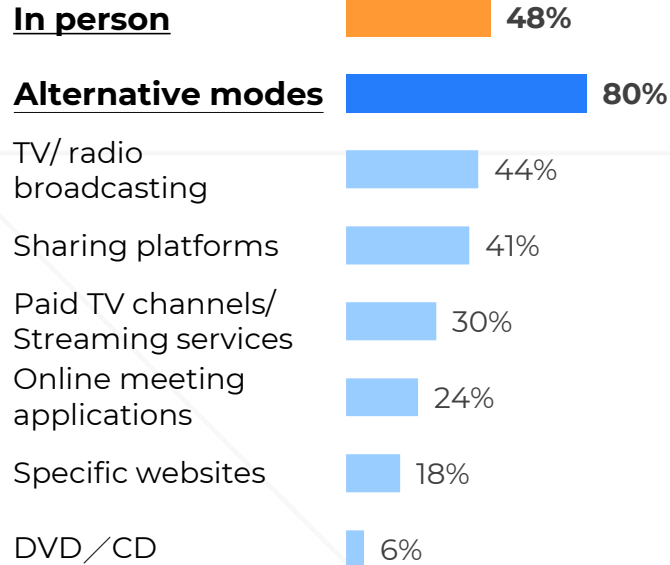
Sample size (n=)

Remark: figures for those aged 65-74 are not shown due to very small base (n<10)

Green/Red indicates subgroup figures that are significantly higher/lower than the total results for all respondents at 95% CI.

Participation mode among Multi-arts participants – by life segment

- Working singles and Parents with younger children aged 5-14 were more likely to view in alternative modes where TV/ radio broadcasts and sharing platforms were most common.



	Students	Working singles	Married/co-habited persons w/o children	Parents with children aged 0-4	Parents with children aged 5-14	Parents with children aged 15+
In person	51%	52%	54%	44%	32%	55%
Alternative modes	86%	83%	80%	87%	89%	67%
TV/ radio broadcasting	28%	32%	57%	65%	40%	41%
Sharing platforms	76%	58%	27%	33%	53%	24%
Paid TV channels/ Streaming services	34%	18%	17%	34%	45%	34%
Online meeting applications	38%	32%	24%	15%	25%	20%
Specific websites	17%	20%	33%	12%	19%	17%
DVD/CD	7%	13%	27%	3%	-	-

Sample size (n=)

11#

45

16#

29#

38

40

Source: Q106a
Base: Multi-arts participants (n=185)
denotes small base (n<30)

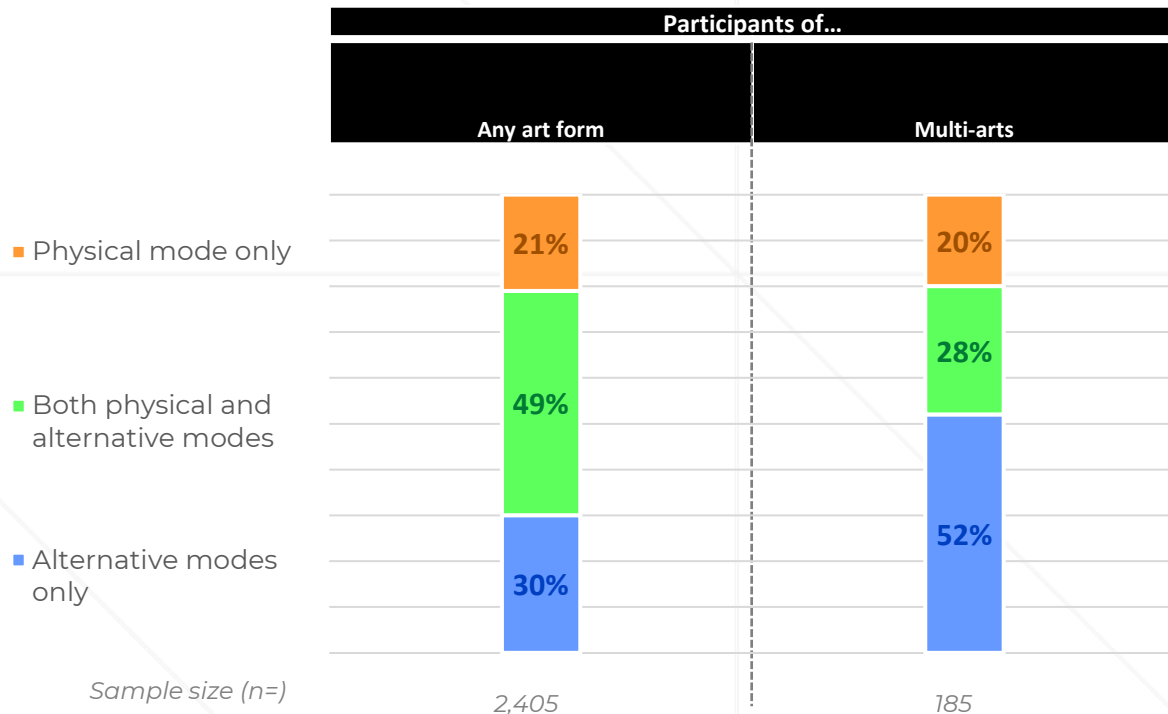
Remark: figures for Retirees/ aged 65+ are not shown due to very small base (n<10)

Green/Red indicates subgroup figures that are significantly higher/lower than the total results for all respondents at 95% CI.

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Participation mode pattern

- As a whole, relatively fewer viewed Multi-arts through both physical and alternative modes, and instead half chose to participate through alternative modes only.

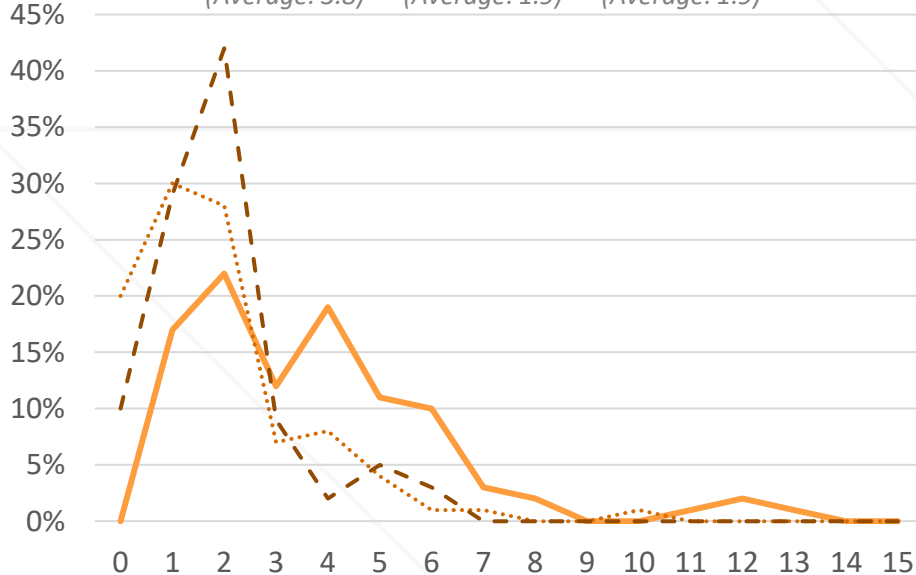


Annual participation frequency to Multi-arts activities from Jul'21 to Jul'22^

- The participation frequency was relatively higher among alternative modes than physical mode on Multi-arts activities.

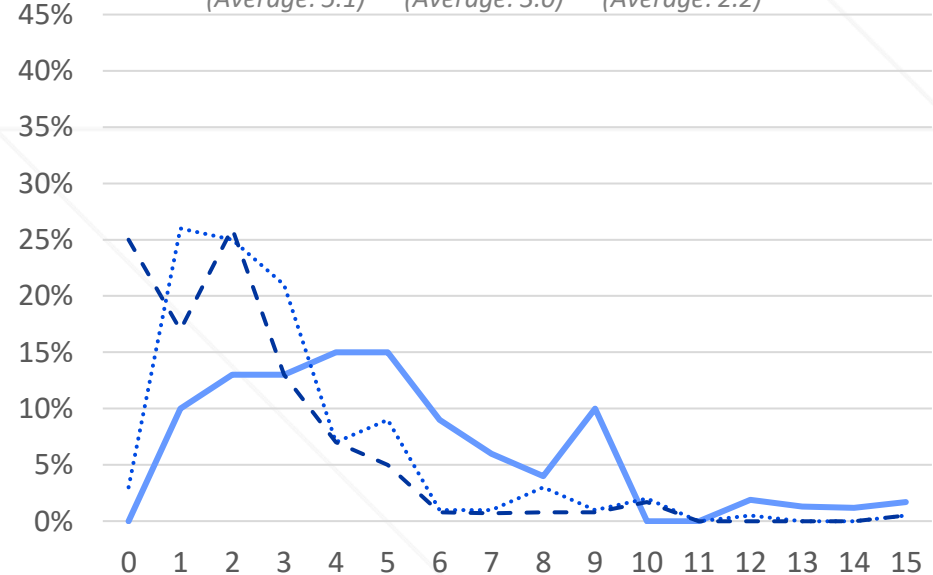
Physical-mode activities

— **All** (Average: 3.8)
⋯ **Free** (Average: 1.9)
- - - **Paid** (Average: 1.9)



Alternative-mode activities

— **All** (Average: 5.1)
⋯ **Free** (Average: 3.0)
- - - **Paid** (Average: 2.2)



Base: Those who participated in any Multi-arts activities through physical mode (n=87)

Source: Q106b

^denotes mean figures

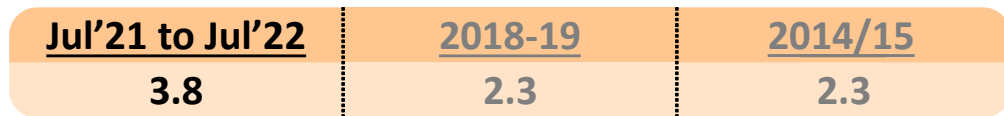
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Base: Those who participated in any Multi-arts activities through alternative modes (n=148)

Annual participation frequency to Multi-arts activities from Jul'21 to Jul'22[^]

- Interestingly, such preferences have evolved throughout the pandemic, as the viewership frequency through alternative modes had dropped whereas participation frequency through physical mode had improved.
- However, as comparatively few participated in Multi-arts, the projected attendance was relatively lower than that of other core art forms.

Physical mode

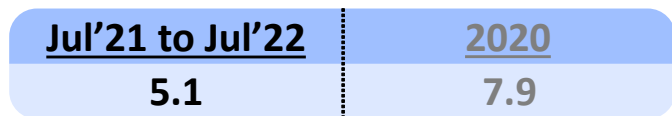


Base: Those who participated in any Multi-arts activities through physical mode (n=87)

Projected annual attendance in

physical mode: 0.6M
2014/15: 0.8M

Alternative modes



Base: Those who participated in any Multi-arts activities through alternative modes (n=148)

alternative modes: 1.4M

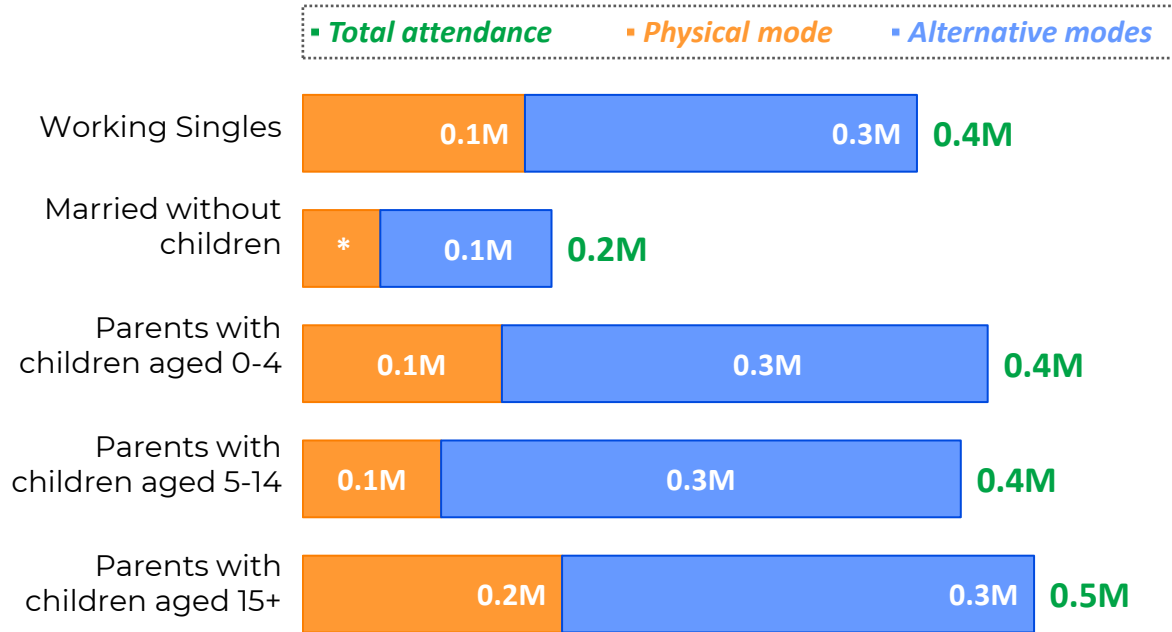
Source: Q106b

[^]denotes mean figures

Remark: The projected attendance = summary of weighted individual responses.

Projected annual attendance on Multi-arts activities - by life segment

- The attendance of Parents with children aged 15+ on Multi-arts activities (both physical and alternative modes) was more than that of other life stage segments.

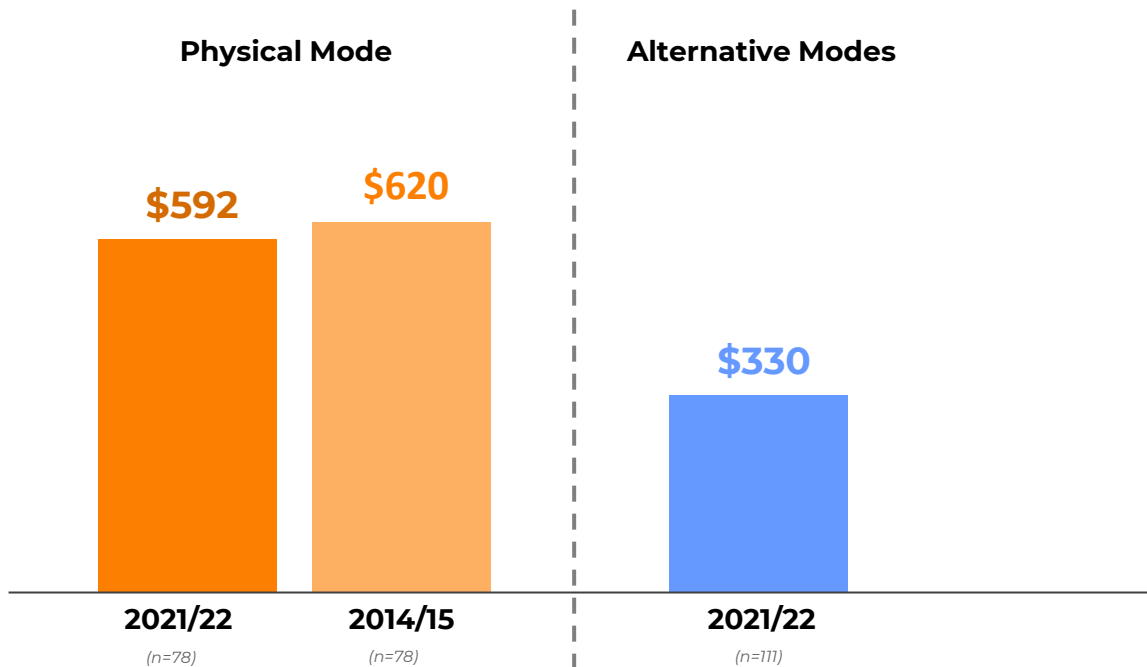


2.0M (0.6M+1.4M)
Projected annual attendance on Multi-arts participation from Jul'21 to Jul'22.

Source: Q106c
Base: Among those who had participated in Multi-arts (n=185)
Remark: The projected attendance = summary of weighted individual responses.

Annual expenditure on Multi-arts activities from Jul'21 to Jul'22[^]

- Participants appeared to spend less on Multi-arts activities and average spending through physical mode dropped by 5% since 2014/15.



Base: Those who paid for Multi-arts activities through physical mode

Base: Those who paid for Multi-arts activities through alternative modes

Source: Q106c

[^]denotes mean figures

Remark: The projected expenditure = summary of weighted individual responses.

Projected annual expenditure in

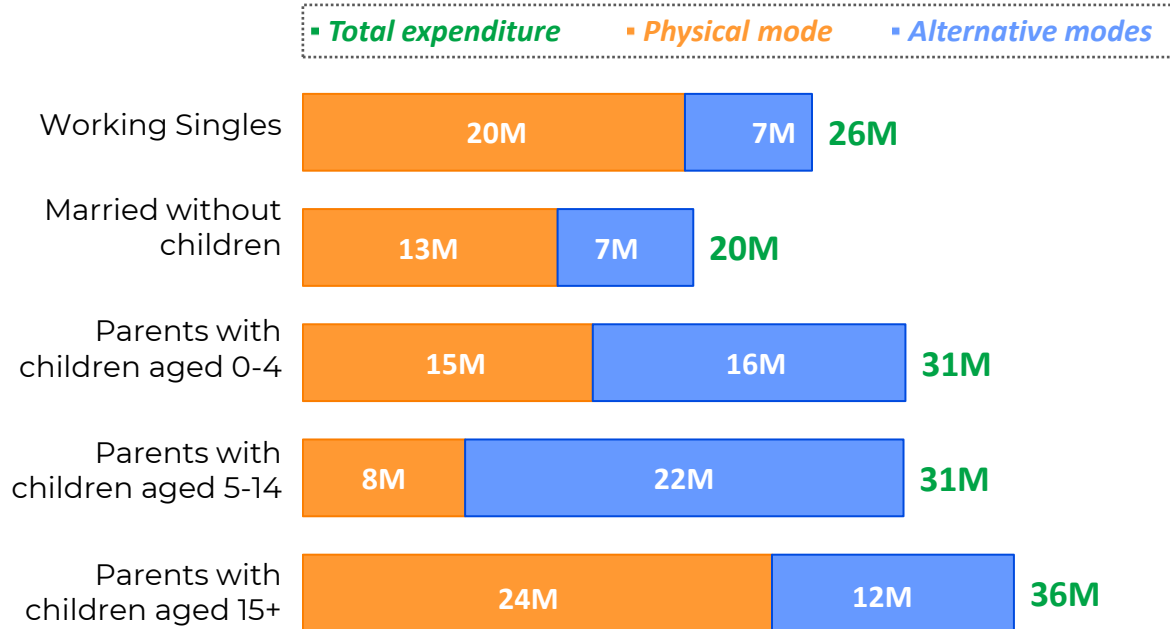
physical mode: 87M

2014/15: 150M

alternative modes: 68M

Projected annual expenditure on Multi-arts activities - by life segment

- The projected expenditure of Parents with children aged 15+ on Multi-arts activities was more than that of other life stage segments.

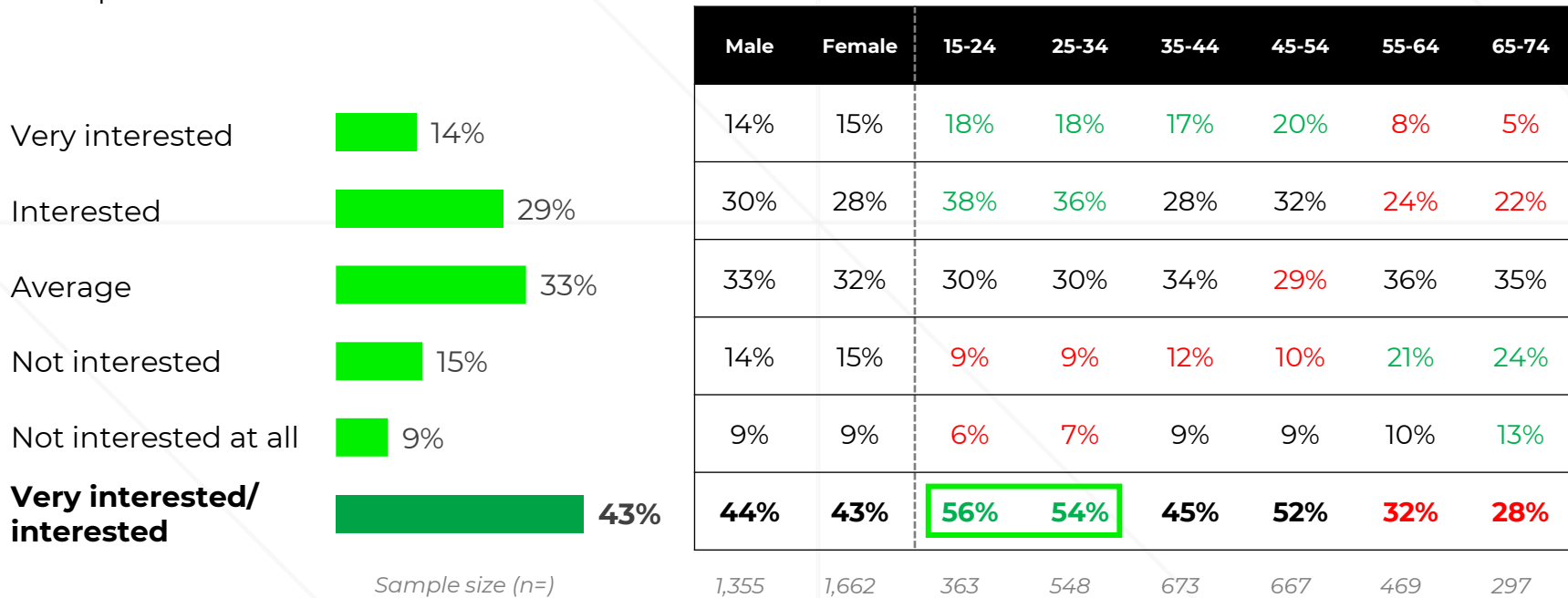


154M (87M+68M)
Projected annual expenditure on Multi-arts participation from Jul'21 to Jul'22.

Source: Q106c
Base: Among those who had participated in Multi-arts (n=185)
Remark: The projected expenditure = summary of weighted individual responses.

Future physical participation interest level^ in Multi-arts among all respondents – by gender and age







- The outlook for Multi-arts remained positive as over two-fifths reported that they were interested in participating through physical mode in the future. In fact, although the physical participation incidence of younger consumers aged 15-34 in Multi-arts dropped in 2021/22 compared to 2014/15, over half of them expressed interest in this art form.



Source: Q11
 Base: All respondents (n=3,017)
 ^denotes participation interest in physical mode among all respondents in the next 12 months.
 Green/Red indicates subgroup figures that are significantly higher/lower than the total results for all respondents at 95% CI.
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Future physical participation interest level^ in Multi-arts among all respondents – by life segment

- By life segment, although the physical participation incidence of students and Parents with younger children aged 0-14 in Multi-arts dropped in 2021/22 compared to 2014/15, they reportedly had a relatively higher potential of attending Multi-Arts events through physical mode in the future.

		Students	Working singles	Married/co-habited persons w/o children	Parents with children aged 0-4	Parents with children aged 5-14	Parents with children aged 15+	Retirees/aged 65+
Very interested	 14%	15%	13%	11%	18%	24%	12%	6%
Interested	 29%	37%	30%	32%	34%	31%	27%	22%
Average	 33%	30%	32%	32%	34%	30%	34%	34%
Not interested	 15%	12%	12%	14%	6%	11%	18%	24%
Not interested at all	 9%	6%	12%	12%	8%	4%	8%	15%
Very interested/ interested	 43%	52%	43%	43%	52%	55%	40%	28%

Sample size (n=)

181

649

183

289

543

940

204

Source: Q11

Base: All respondents (n=3,017)

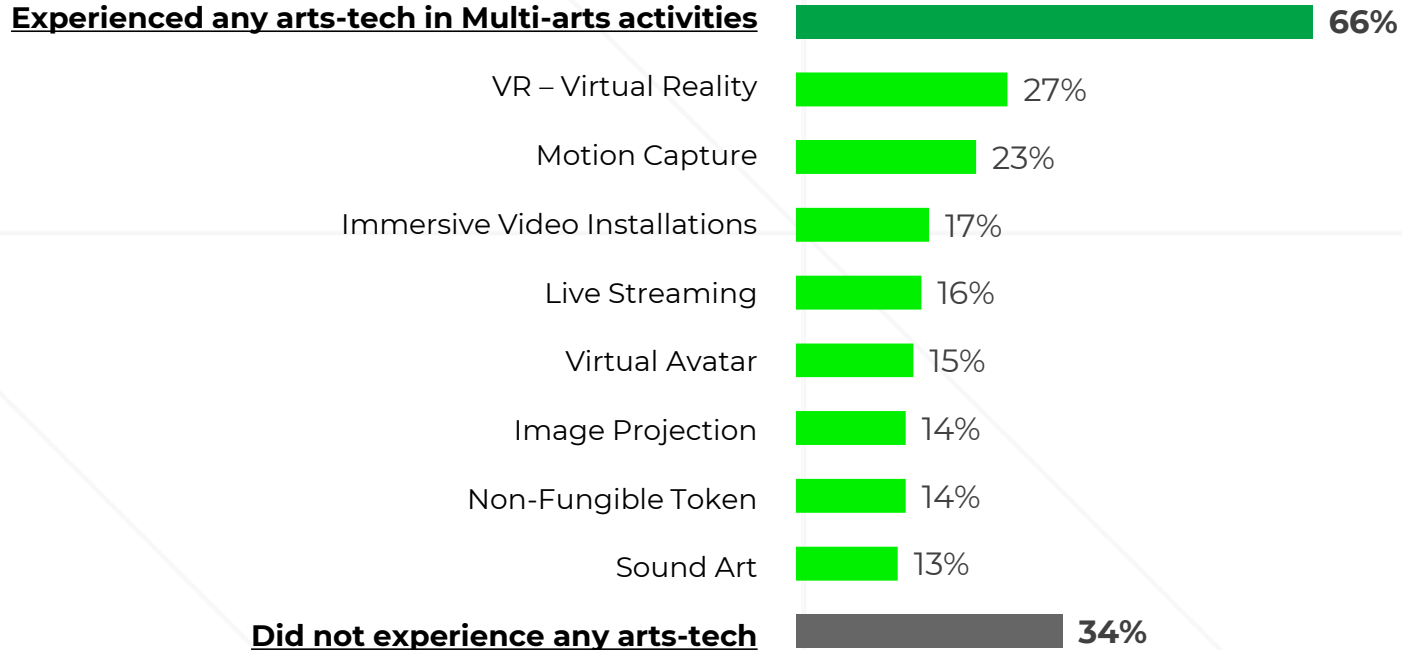
^denotes participation interest in physical mode among all respondents in the next 12 months.

Green/Red indicates subgroup figures that are significantly higher/lower than the total results for all respondents at 95% CI.

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Claimed incidence of experiencing arts-tech (any mode) in Multi-arts activities

- Two-thirds have experienced arts-tech in Multi-arts activities.
- Virtual reality and motion capture were the top 2 forms of arts-tech experienced most.



Projected population of existing, potential & arts-tech-driven Multi-arts participants

- The projected population interested in Multi-arts activities was predominantly made up of 'potential' participants. As such, improving the market's awareness of Multi-arts performances might be more important to improve attendance.

342,435 (12%)

**Existing participants
(any mode)**

(from July 2021 to July 2022)

2,315,815 (81%)

**Potential participants[®]
(physical mode)**

(In the next 12 months)

210,311 (7%)

**Participants solely
driven by arts-tech[^]
(any mode)**

2,868,562

**Projected population interested in
participating in Multi-arts activities
through any mode**

Source: Q101, Q111, Q206, Q207
Base: All respondents (n=3,017)

[®]The projected no. of potential participants is based on the proportion of respondents who claimed that they did not participate in any Multi-arts activity from July 2021 to July 2022, but would be interested in doing so in the 12 months after.

[^]The projected no. of participants solely driven by arts-tech is based on the proportion of respondents who claimed that they did not participate in any Multi-arts activity from July 2021 to July 2022, and are not interested in doing so in the 12 months after, but would be interested in participating in them due to arts-tech.

Attractiveness of different selling points for Multi-arts programmes - by type of participants

(among those interested in participating in Multi-arts activities)

- In particular, it would be crucial to develop inspirational/ reflective topics and introduce internationally renowned Multi-arts artists to pique the interest of the potential participants and expand the pool of Multi-arts attendees.

	Total	Existing participants	Potential participants	Participants solely driven by arts-tech
Inspirational/Reflective Topics	30%	36%	31%	22%
Award-winning/Reenactment Works	27%	26%	25%	36%
Locally renowned creators or performers/groups	27%	32%	29%	24%
Internationally renowned creators or performers/groups	26%	27%	30%	32%
Adaptation of works/Secondary creation	26%	32%	28%	24%
Arts-tech	13%	15%	11%	39%
<i>Sample size (n=)</i>	2,372	176	1,240	110

Source: Q208

Base: Those who are interested in participating in Multi-arts activities

Green/Red indicates subgroup figures that are significantly higher/lower than the total results for all respondents at 95% CI.

Attractiveness of different selling points for Multi-arts programmes - by gender and age

(among those interested in participating in Multi-arts activities)

- Relatively more of consumers aged 45-54 preferred inspirational/ reflective topics, whereas older consumers aged 55-64 preferred classic works more than others. Consumers aged 25-34 and 45-54 were also more open to cross-disciplinary collaborations.
- On the other hand, adaptations of works/ secondary creations tended to be more appealing to younger consumers aged 15-34.

	Total	Male	Female	15-24	25-34	35-44	45-54	55-64	65-74
Inspirational/Reflective Topics	30%	31%	30%	31%	33%	30%	34%	29%	20%
Award-winning/Reenactment Works	27%	27%	27%	23%	24%	25%	26%	31%	32%
Locally renowned creators or performers/groups	27%	27%	26%	31%	27%	31%	29%	20%	22%
Internationally renowned creators or performers/groups	26%	28%	26%	25%	26%	28%	29%	26%	23%
Adaptation of works/Secondary creation	26%	25%	26%	32%	30%	26%	27%	20%	20%
Classic works	25%	26%	25%	20%	21%	21%	21%	35%	35%
Local Original/Novel Works	22%	22%	21%	22%	22%	22%	21%	20%	21%
Cross-disciplinary collaborations	21%	21%	20%	20%	25%	22%	26%	15%	11%
Programmes/Promotions for Art Festivals or Book Fairs	18%	17%	19%	18%	18%	20%	21%	16%	13%
New Venue/Upgraded Venue Sound Effects, etc.	15%	15%	16%	13%	18%	16%	18%	13%	12%
Suitable for children to participate in/Family fun program	15%	15%	16%	21%	21%	18%	14%	9%	9%
Audience Interactive Participation	14%	14%	14%	15%	17%	16%	13%	14%	9%
Incorporation of Art-tech	13%	13%	13%	10%	16%	15%	12%	14%	5%
Experimental creation	4%	3%	5%	4%	7%	4%	3%	3%	3%
Sample size (n=)	2,372	1,066	1,306	310	468	541	547	322	184

Source: Q208

Base: Those who are interested in participating in Multi-arts activities

Green/Red indicates subgroup figures that are significantly higher/lower than the total results for all respondents at 95% CI.

Attractiveness of different selling points Multi-arts programmes - by life segment

(among those interested in participating in Multi-arts activities)

- By life segment, Students and Parents with younger children aged 0-14 were more interested in adaptations of works/ secondary creations and inspirational/ reflective topics.

	Total	Students	Working singles	Married/c o-habited persons w/o children	Parents with children aged 0-4	Parents with children aged 5-14	Parents with children aged 15+	Retirees/ aged 65+
Inspirational/Reflective Topics	30%	31%	33%	23%	37%	30%	30%	17%
Award-winning/Reenactment Works	27%	17%	25%	36%	22%	26%	28%	30%
Locally renowned creators or performers/groups	27%	25%	27%	31%	28%	29%	24%	23%
Internationally renowned creators or performers/groups	26%	22%	26%	23%	25%	28%	28%	26%
Adaptation of works/Secondary creation	26%	34%	26%	21%	27%	30%	25%	17%
Classic works	25%	15%	27%	26%	18%	21%	27%	37%
Local Original/Novel Works	22%	22%	27%	21%	20%	23%	19%	21%
Cross-disciplinary collaborations	21%	19%	22%	21%	21%	25%	20%	10%
Programmes/Promotions for Art Festivals or Book Fairs	18%	19%	14%	13%	22%	21%	20%	12%
New Venue/Upgraded Venue Sound Effects, etc.	15%	14%	16%	12%	17%	15%	18%	8%
Suitable for children to participate in/Family fun program	15%	18%	15%	12%	26%	19%	13%	7%
Audience Interactive Participation	14%	18%	17%	16%	12%	14%	14%	9%
Incorporation of Art-tech	13%	15%	18%	17%	12%	11%	11%	8%
Experimental creation	4%	5%	9%	3%	5%	2%	2%	4%
Sample size (n=)	2,372	149	511	140	254	468	709	123

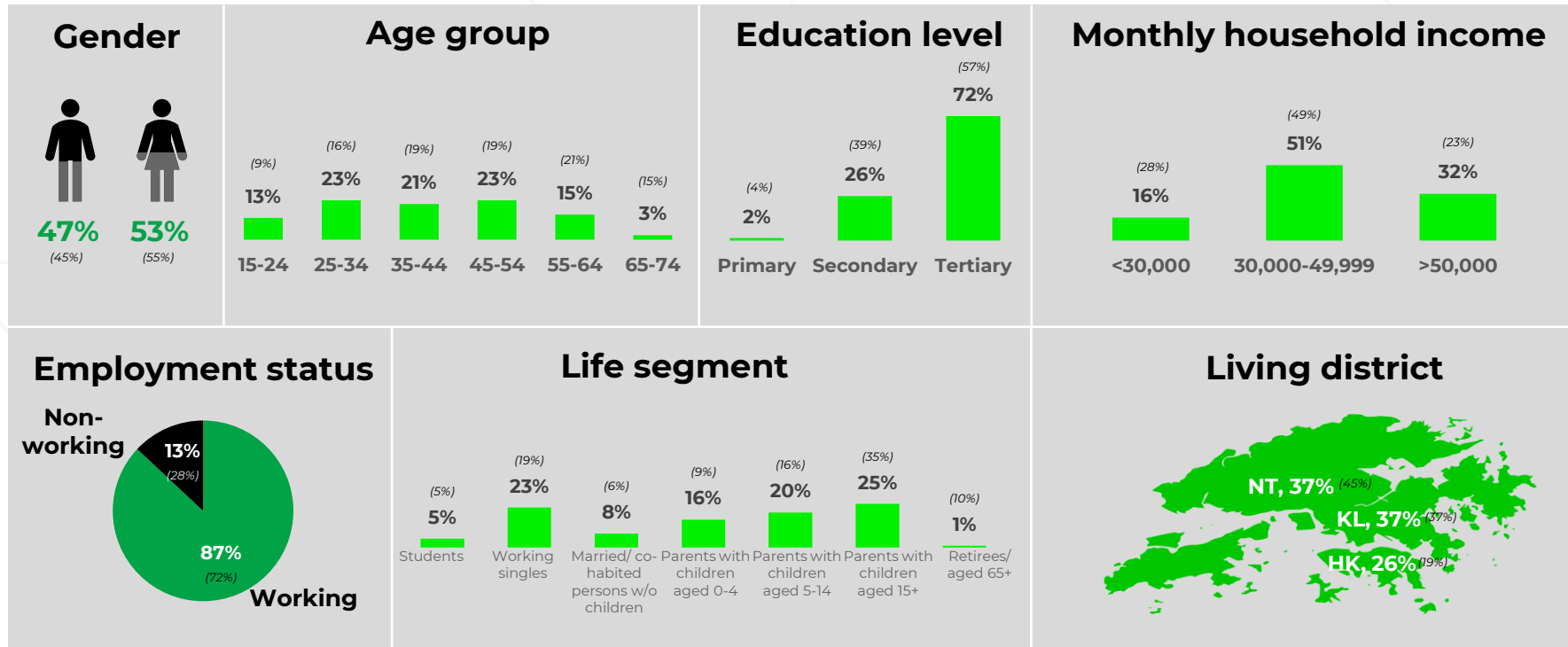
Source: Q208

Base: Those who are interested in participating in Multi-arts activities

Green/Red indicates subgroup figures that are significantly higher/lower than the total results for all respondents at 95% CI.

Profile of Multi-arts participants

- Compared to the general population, Multi-art participants were more likely to be aged 15-34 and 45-54, tertiary educated and with a monthly household income > \$50,000. They were also more likely to be Working singles and Parents with children aged 0-4.



Source: Q5, Q6, Q7, Q301, Q302, Q304, Q305, Q306

Base: Multi-arts respondents (n=185)








() denotes figures for all respondents

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Appendix

Life segments by age

		15-24	25-34	35-44	45-54	55-64	65-74
Students	 5%	48%	1%	-	*	-	-
Working singles	 19%	45%	50%	17%	10%	6%	3%
Married/co-habited persons w/o children	 6%	3%	8%	9%	7%	6%	1%
Parents with children aged 0-4	 9%	2%	28%	16%	4%	1%	-
Parents with children aged 5-14	 16%	*	11%	44%	24%	5%	1%
Parents with children aged 15+	 35%	*	1%	14%	55%	79%	32%
Retirees/ aged 65+	 11%	-	-	*	*	2%	64%
	Sample size (n=)	363	548	673	667	469	297

Source: Q304, Q305, Q306

Base: All respondents (n=3,017)

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THANK YOU!

