

Contents - Xiqu

Notes to readers	3
Summary	4
Overview of incidence, projected population and expenditure Participation mode Annual participation frequency and projected attendance Average and projected annual expenditure	5 6-10 11-14 15-17
 Genre findings: Participation incidence Distribution of existing and interested genre participants Existing and interested genre participants 	18-22 18-19 20 21-22
Future physical participation interest level	23-24
 Findings on arts-tech Claimed incidence of experiencing arts-tech Projected population of existing, potential & arts-tech-driven Xiqu participants Incidence of rising participation interest due to arts-tech 	25-27 25 26 27
Attractiveness of different selling points for <i>Xiqu</i> programmes Profile of <i>Xiqu</i> participants Appendix	28-30 31 32-33

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 *Xiqu*

• Cantonese Opera, Cantonese Operatic Song, other *Xiqu* genres (including Jingkun / Nanyin), and mixed genres and others

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 <u>other subgroups'/ other categories'</u> results black dotted boxes highlight figures that were notably different from <u>past waves'</u> results

Xiqu

17% Xiqu participation

17%, or a projected population of 1 million aged 15-74, participated in *Xiqu* activities during Jul'21-Jul'22, which had risen slightly since 2020 (+6%). In particular, Cantonese Operatic Song (10%) and Cantonese Opera (9%) were the top *Xiqu* genres participated in.

8% in physical mode

8%, or a projected population of 482 thousand aged 15-74, attended *Xiqu* performances through physical mode during Jul'21-Jul'22, which represented a slight drop since 2014/15 (-2%). However, attendance frequency had improved among existing participants, rising to 3.6 activities per person (from 2.1 in 2014/15).

15% in alternative modes

15%, or a projected population of 863 thousand aged 15-74, viewed *Xiqu* activities through alternative modes during Jul'21-Jul'22 and showed signs of improvement since 2020 (+4%). In a similar fashion, viewership frequency also improved to 7.2 activities per person (from 5.1 in 2020).



Overview of incidence, projected population and expenditure – Xiqu

- Although attendance to *Xiqu* activities has improved since 2020, in-person attendance levels were still slightly below that observed in 2014/15.
- Cantonese Operatic Song and Cantonese Opera were the most prevalent genres of *Xiqu* viewed between Jul'21 and Jul'22.

17%

Participated in *Xiqu* from Jul'21 to Jul'22

- Cantonese Operatic Song: 10%
- Cantonese Opera: 9%
- Other Xiqu genres (including Jingkun/Nanyin): 2%
- Mixed genres and others: 1%

1M

Projected population of *Xiqu* participants

- Physical mode: 8% (482k)
 - **2020: 2% (+6%)**
 - **2018-2019: 7% (+1%)**
 - **2**014/15: 10% (-2%)
- Alternative modes: 15% (863k)
 - **2020: 11% (+4%)**
 - **2018-2019: 13% (+2%)**

\$498M

Expenditure in Xiqu

- Physical mode: \$265M
 - 2014/15: 197M (+68M)
- Alternative modes: \$233M
 - 47% of total expenditure

Participation mode of Xiqu participants – by gender and age

(among all respondents)

• More specifically, in-person attendance dropped substantially among older consumers aged 45-74 since 2014/15, possibly due to concern about contracting COVID-19 at public events. Instead, they appeared to substitute the physical events with participation through alternative modes since 2020.

	In person		
2021/22	2 (Stage 3)	8%	
	2014/15	10%	

Male	Female	15-24	25-34	35-44	45-54	55-64	65-74
8%	8%	6%	4%	4%	7 %	12%	16%
n=1,355	n=1,662	n=363	n=548	n=673	n=667	n=469	n=297
8%	12%	5%	3%	4%	12%	20%	23%
n=1,364	n=1,632	n=441	n=564	n=582	n=547	n=520	n=262

Alternative modes	
2021/22 (Stage 3)	15%
2020 (Stage 1)	11%

16%	14%	15%	12%	13%	14%	15%	19%
n=1,355	n=1,662	n=363	n=548	n=673	n=667	n=469	n=297
14%	9%	7 %	16%	15%	8%	8%	N/A
n=670	n=830	n=194	n=350	n=367	n=310	n=279	

Source: Q105a
Base: All respondents (n=3,017)
Note: In stage 1 survey, the respondents were HK residents aged 15-64.
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Participation mode of Xiqu participants – by life segment

(among all respondents)

A similar pattern was observed among Parents with older children aged 5+ and Retirees, who reduced
their participation through physical mode since 2014/15. In contrast, relatively more students and Married
persons with no children have participated in Xiqu activities through physical mode since 2014/15 and
through alternative modes since 2020.

I	n person		
2021/22	(Stage 3)	8%	
	2014/15	10%	
		_	

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+
6%	4% n=649	8%	6% n=289	5%	10%	18%
5%	4%	6%	3%	7%	17%	23%
n=320	n=815	n=211	n=72	n=387	n=888	n=257

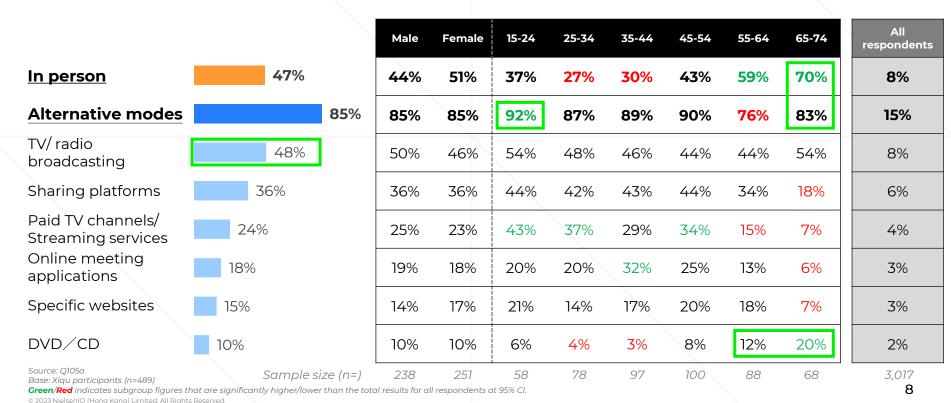
Alternative modes

2021/22 (Stage 3)	15%
2020 (Stage 1)	11%

13%	10%	13%	16%	15%	17%	18%
n=181	n=649	n=183	n=289	n=543	n=940	n=204
6%	12%	5%	17%	18%	17%	7%
n=121	n=473	n=316	n=176	n=288	n=76	n=26#

Participation mode among Xiqu participants – by gender and age

- Most participated in Xiqu through alternative modes, notably through TV/Radio and sharing platforms...
- Older generations aged 65-74 were much more likely to participate through both modes, whereas younger participants aged 15-24 mainly attended through alternative modes. In addition, older generations aged 55-74 were more interested in DVD/CDs of *Xiqu*.



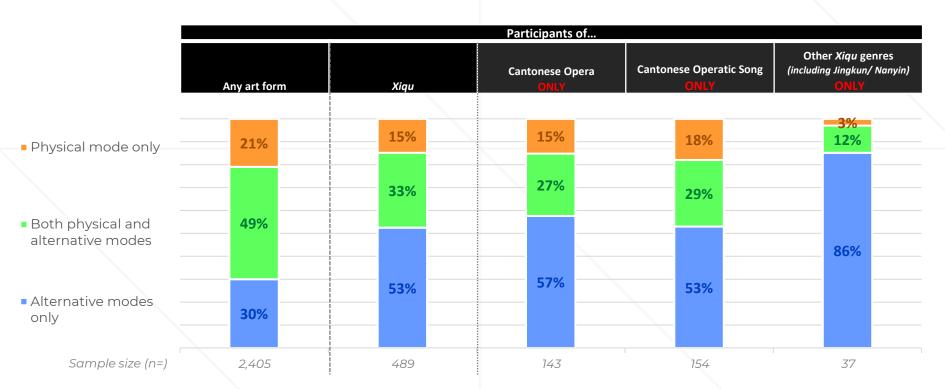
Participation mode among Xiqu participants – by life segment

The same applied for life segments – apart from Retirees, all others primarily attended through alternative modes. In particular, Parents with children aged 0-4 preferred paid TV channels/ streaming services and online meeting applications, whereas Parents with children aged 5-14 preferred TV/ radio broadcasts and

sharing platforms	S.	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+
<u>In person</u>	47%	43%	36 %	45 %	33 %	33 %	50%	76 %
Alternative modes	85%	87%	85%	80%	93%	90%	86%	75 %
TV/ radio broadcasting	48%	54%	42%	60%	51%	47%	47%	48%
Sharing platforms	36%	44%	43%	33%	33%	46%	36%	19%
Paid TV channels/ Streaming services	24%	39%	34%	10%	45%	33%	21%	5%
Online meeting applications	18%	29%	15%	14%	39%	21%	19%	3%
Specific websites	15%	15%	20%	11%	7%	13%	20%	9%
DVD/CD	10%	6%	2%	5%	7%	2%	12%	25%
Source: Q105a Base: Xiqu participants (n=489) # denotes small base (n<30)	Sample size (n=)	27#	78	31	47	88	169	47

Participation mode pattern - by Xiqu genre

• Compared to other art forms, *Xiqu* activities were more commonly viewed through alternative modes, especially for 'Other *Xiqu* genres' such as Jingkun and Nanyin.



Annual participation frequency to Xiqu activities from Jul'21 to Jul'22[^]

• Participation frequency in alternative mode is significantly higher than that on physical mode (xiqu +3.6 vs other art forms +1.3-2.1). Participants of Xiqu activities had relatively more clear-cut preferences – those who attended through physical mode viewed paid activities more frequently, whereas those who participated through alternative modes preferred free activities.

• Furthermore, while the majority attended between 1-9 activities in both physical and alternative modes, a decent portion of participants appeared to be big fans of the art form and participated in 10 and 20 activities through alternative modes from Jul'21 to Jul'22.



11

Source: O105b

Adenotes mean figures

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Annual participation frequency to Xiqu activities from Jul'21 to Jul'22[^]

 Participation frequency has increased for both physical and alternative modes, and a larger increase was noticed through alternative modes, possibly because COVID-19 restricted the availability of performances in physical mode.

Physical mode

Jul'21 to Jul'22	<u>2018-19</u>	2014/15
3.6	2.8	2.1

Base: Those who participated in any Xiqu activities through physical mode (n=212)

Projected annual attendance in

physical mode: 1.7M

Alternative modes

Jul'21 to Jul'22	<u>2020</u>
7.2	5.1

Base: Those who participated in any Xiqu activities through alternative modes (n=421)

alternative modes:

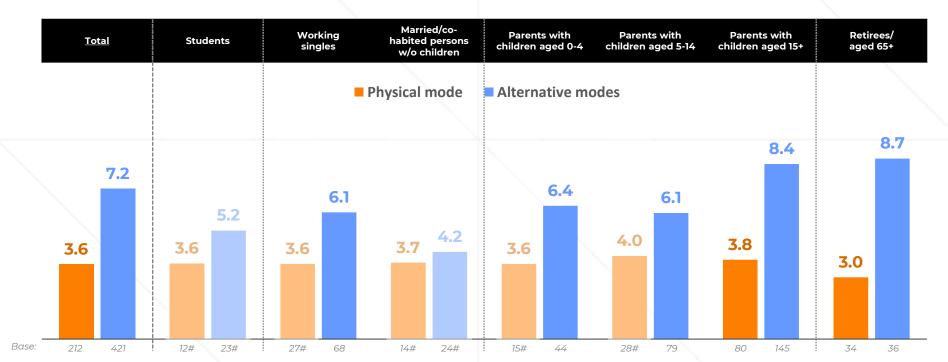
6.2M

Source: Q105b ^denotes mean figures

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

Annual participation frequency to *Xiqu* activities from Jul'21 to Jul'22 – by life segment[^]

• The relatively older segments, including Parents with children aged 15+ and Retirees, viewed *Xiqu* activities through alternative modes more frequently than the rest. Yet, the participation of Retirees through physical mode was comparatively less frequent.

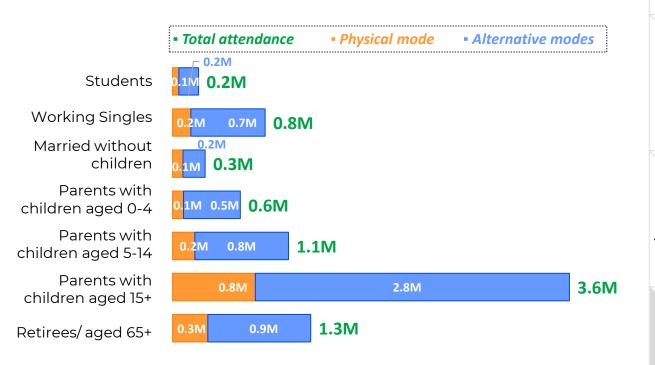


Source: Q105b

Base: Those who participated in any Xiqu activities through physical or alternative modes respectively **Adenotes mean figures**

Projected annual attendance on Xiqu activities - by life segment

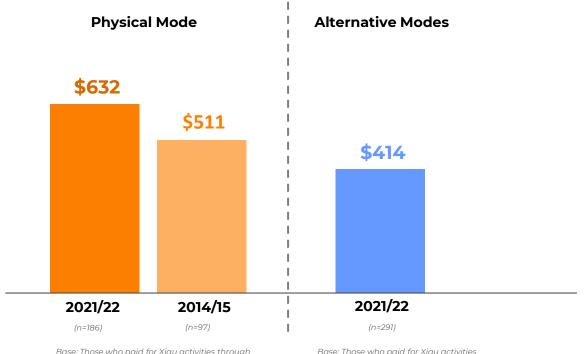
• The attendance of Parents with children aged 15+ on *Xiqu* activities (both physical and alternative modes) was significantly more than other life stage segments.



8.0M (1.7M+6.2M)
Projected annual attendance on *Xiqu* participation from Jul'21 to Jul'22.

Annual expenditure on Xiqu activities from Jul'21 to Jul'22¹

• In addition to the growth in attendance frequency, average spending on Xiqu activities through physical mode has increased since 2014/15.



Base: Those who paid for Xiqu activities through

Base: Those who paid for Xiqu activities through alternative modes

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

Projected annual expenditure in

physical mode: 265M

2014/15: 197M

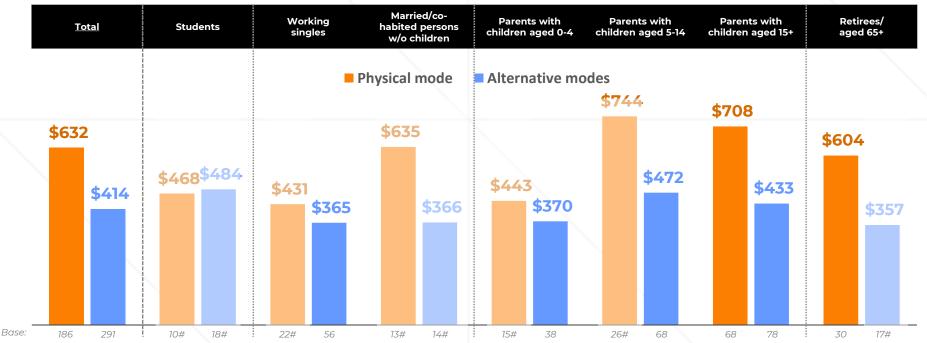
alternative modes: 233M

15

Source: O105c Adenotes mean figures

Average annual expenditure on *Xiqu* activities from Jul'21 to Jul'22 – by life segment[^]

 Parents with children aged 5-14 and Parents with children aged 15+ spent the most through physical mode than Parents with children aged 0-4. With the exception of Students, expenditure through physical mode is higher than alternative modes in other segments.

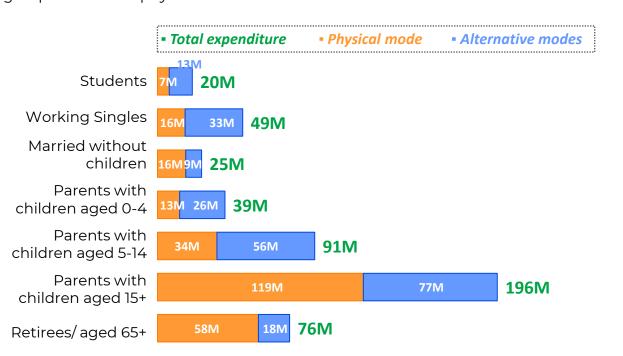


Source: Q105c

Base: Those who paid for Xiqu activities through physical or alternative modes respectively ^denotes mean figures

Projected annual expenditure on Xiqu activities - by life segment

• The projected expenditure of Parents with children aged 15+ on *Xiqu* activities (both physical and alternative modes) was more than that of other life stage segments due a higher attendance frequency and expenditure as well as a larger group size in both physical and alternative modes.



498M

(265M+233M)

Projected annual expenditure on *Xiqu* participation from Jul'21 to Jul'22.

Participation incidence (any mode) in Xiqu genre – by gender and age

• Cantonese Operatic Song and Cantonese Opera were the two primary *Xiqu* activities attended across the board and were especially enjoyed among older consumers aged 65-74.

		Male	Female	15-24	25-34	35-44	45-54	55-64	65-74
Any art form	78%	78%	77 %	78%	88%	82%	85%	71 %	62 %
Xiqu	17%	18%	16%	16%	14%	15%	15%	20%	23%
Cantonese Operatic Song	10%	11%	10%	10%	6%	7 %	8%	11%	19%
Cantonese Opera	9%	10%	8%	6%	8%	7 %	8%	11%	14%
Other Xiqu genres (including Jingkun/Nanyin)	2%	2%	2%	2%	3%	2%	1%	2%	1%
Mixed genres and others	1%	1%	1%	2%	1%	1%	1%	1%	1%
	Sample size (n=)	1,355	1,662	363	548	673	667	469	297

Participation incidence (any mode) in Xiqu genre – by life segment

• Parents with older children aged 15+ and Retirees viewed relatively more Cantonese Operatic Song and Cantonese Opera. In contrast, Working singles watched fewer *Xiqu* performances as a whole and across

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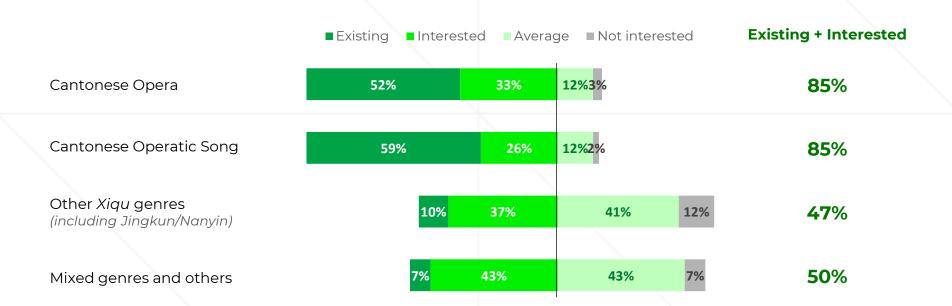
		Students	Working singles	Married/c o-habited persons w/o children	Parents with children aged 0-4	Parents with children aged 5-14	Parents with children aged 15+	Retirees/ aged 65+
Any art form	78	68%	73 %	76 %	87 %	90%	79 %	59%
Xiqu	17%	15%	12%	17 %	17 %	16%	19%	24%
Cantonese Operatic Song	10%	7%	7%	7 %	7 %	8%	12%	20%
Cantonese Opera	9%	7%	6%	10%	8%	7%	10%	13%
Other Xiqu genres (including Jingkun/Nanyin)	2%	2%	1%	1%	5%	2%	2%	1%
Mixed genres and others	1%	3%	1%	2%	2%	2%	1%	2%
	Sample size (n=	=) 181	649	183	289	543	940	204

Source: Q101

Base: All respondents (n=3,017)

Distribution of existing and interested genre participants (any mode) among Xiqu participants

• There was an equally large proportion of existing and interested participants in Cantonese Opera and Cantonese Operatic Song. In contrast, the proportion of existing participants was low for Other *Xiqu* genres and Mixed genres and others, despite a relatively high-interest level in these two genres.



Existing and interested genre participants (any mode) – by gender and age¹ (among Xigu participants)

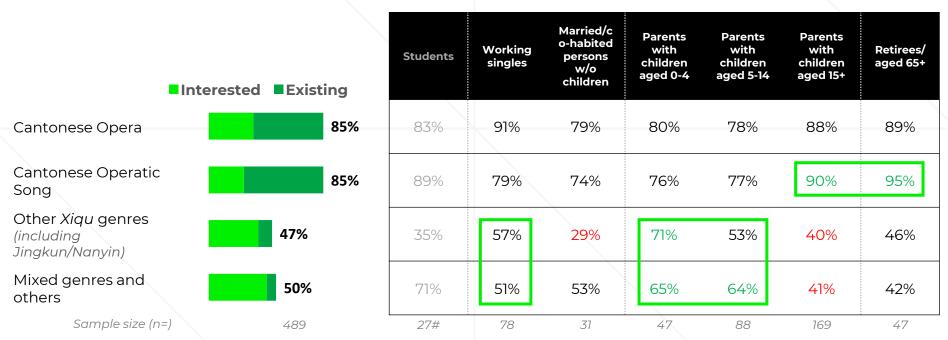
• Younger participants aged 15-24 were much more interested in participating in Other Xigu genres and Mixed genres and others, whereas older participants aged 55-74 were relatively more focused on Cantonese Opera and Cantonese Operatic Song.



A Figures include both existing participants and those who are interested in participating in the future.

Existing and interested genre participants (any mode) – by life segment[^]

 By life segment, Working singles and Parents with children aged 0-14 were more open to these other genres of Xiqu and mixed genres and others. Parents with children aged 15+ and Retirees were more inclined to participate in Cantonese Operatic song.



Source: Q101, Q105d Base: Xiqu participants # denotes small base (n<30)

AFigures include both existing participants and those who are interested in participating in the future.

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

Future physical participation interest level in Xiqu among all respondents – by gender and age

• In fact, younger participants aged 15-24 exhibited relatively more interest in participating in *Xiqu* in the future. Although the physical participation incidence of the older generation aged 45-74 in *Xiqu* dropped in 2021/22 compared to 2014/15, the segment's future physical participation interest was high.

		Male	Female	15-24	25-34	35-44	45-54	55-64	65-74
Very interested	14%	14%	13%	15%	11%	12%	18%	11%	15%
Interested	26%	26%	26%	35%	20%	22%	26%	27%	31%
Average	30%	30%	29%	28%	34%	31%	27%	29%	28%
Not interested	17%	17%	18%	14%	20%	19%	14%	19%	16%
Not interested at all	13%	13%	14%	8%	15%	16%	14%	14%	10%
Very interested/ interested	40%	40%	39%	50%	31%	34%	44%	38%	45%
	Sample size (n=)	1,355	1,662	363	548	673	667	469	297

Base: All respondents (n=3,017)

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

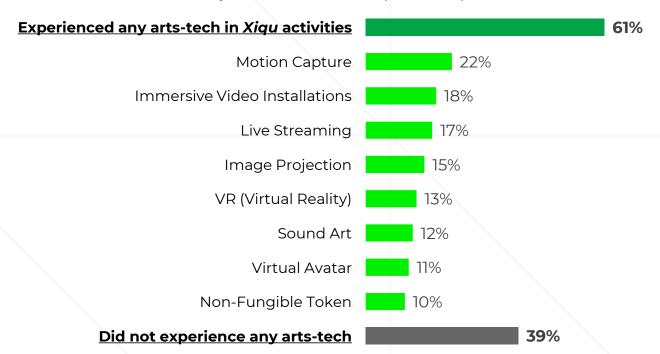
Future physical participation interest level in Xiqu among all respondents – by life segment

- The future physical participation interest levels of *Xiqu* activities among Working singles and Married persons with no children were the lowest among people of all life segments despite their sustained physical participation from 2014/15 to 2021/22.
- Instead, such interest primarily came from Parents with older children aged 15+ and Retirees, although their physical participation in 2021/22 declined when compared to 2014/15.

		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+
Very interested	14%	7%	9%	11%	14%	15%	15%	19%
Interested	26%	34%	19%	21%	25%	26%	29%	29%
Average	30%	35%	28%	25%	33%	34%	30%	24%
Not interested	17%	15%	23%	22%	15%	16%	16%	15%
Not interested at all	13%	9%	21%	21%	12%	10%	10%	13%
Very interested/ interested	40%	41%	28%	32 %	39%	40%	44%	48%
Interested	Sample size (n=)	181	649	183	289	543	940	204

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

- Arts-tech seems to be quite common in *Xiqu* as well, as nearly two thirds witnessed arts-tech in their *Xiqu* activities in the past.
- However, arts-tech was relatively less common in Xiqu in comparison to other art forms.



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

• Likely due to the positive reception of arts-tech in *Xiqu* activities, arts-tech was able to attract approximately 255k new participants.

1,014,328 (35%)

Existing participants (any mode)

(from July 2021 to July 2022)

1,632,557 (56%)

Potential participants@ (physical mode)

(In the next 12 months)

255,484 (9%)

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

2,902,369

Projected population interested in participating in *Xiqu* 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 Xiqu activity from July 2021 to July 2022, but would be interested in doing so in the 12 months after.

AThe 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 Xiqu 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.

Incidence of rising participation interest (any mode) due to arts-tech – by genre

• Other than Cantonese Operatic Song and Cantonese Opera, these arts-tech-driven respondents would also appreciate arts-tech in the 'Mixed genres and other' *Xiqu* genre.

Cantonese Opera	27%
Cantonese Operatic Song	25%
Other Xiqu genres (including Jingkun/Nanyin)	7%
Mixed genres and others	6%
Sample size (n=)	1,061

Existing participants	Potential participants	Participants solely driven by arts-tech
44%	10%	55%
44%	11%	37%
11%	3%	15%
5%	2%	21%
323	609	129

Attractiveness of different selling points for Xiqu programmes - by type of participants

(among those interested in participating in Xiqu activities)

• However, likely because Xiqu was more of a traditional/cultural form of art, classic works and locally renowned creators/ performers/ groups were relatively more important factors that induced increased participation across the market.

	Total	Existing participants	Potential participants	Participants solely driven by arts-tech
Classic works	42%	46%	34%	60%
Locally renowned creators or performers/groups	30%	36%	28%	31%
Award-winning/Reenactment Works	26%	31%	26%	26%
Adaptation of works/Secondary creation	25%	28%	28%	27%
Inspirational/Reflective Topics	24%	21%	26%	19%
Internationally renowned creators or performers/groups	23%	25%	23%	29%
Arts-tech	6%	6%	4%	15%
Sample size (n=)	2,131	453	836	129

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

(among those interested in participating in Xiqu activities)

- In fact, Arts-tech and experimental creation were relatively less appealing for those who were interested in Xiqu activities.
- Classic works were much more attractive to older generations aged 55-74, whereas younger participants aged 15-24 focused relatively more on adaptations of work/ secondary creation and inspirational/ reflective topics. Audiences aged 25-44 were also more open to cross-disciplinary collaborations.

		Total	Male	Female	15-24	25-34	35-44	45-54	55-64	65-74	
	Classic works	42%	42%	42%	30%	24%	28%	27%	66%	71%	1
Locally renown	ed creators or performers/groups	30%	31%	29%	24%	30%	31%	30%	34%	26%	
Awa	ard-winning/Reenactment Works	26%	23%	29%	23%	24%	25%	26%	28%	30%	
Adapta	ation of works/Secondary creation	25%	24%	26%	30%	25%	28%	30%	21%	20%	
	Inspirational/Reflective Topics	24%	23%	24%	29%	26%	25%	29%	20%	13%	,
Internationally renown	ed creators or performers/groups	23%	22%	23%	26%	27%	27%	29%	14%	15%	
	Local Original/Novel Works	20%	20%	20%	23%	20%	19%	20%	18%	22%	
	Cross-disciplinary collaborations	17%	17%	18%	23%	27%	22%	19%	9%	8%	
Programmes/Promoti	ions for Art Festivals or Book Fairs	15%	15%	15%	14%	16%	19%	19%	12%	10%	
Suitable for children to p	participate in/Family fun program	15%	15%	15%	18%	18%	19%	20%	8%	8%	
New Venue/Up	graded Venue Sound Effects, etc.	14%	14%	14%	12%	16%	11%	17%	16%	12%	
Δ	Audience Interactive Participation	11%	11%	10%	11%	11%	12%	12%	10%	8%	
	Incorporation of Art-tech	6%	5%	7%	6%	8%	7%	7%	6%	1%	
	Experimental creation	2%	3%	2%	1%	3%	2%	1%	3%	2%	
Source: O208	Sample size (n=)	2,131	959	1,172	285	365	453	490	315	223	

Base: Those who are interested in participating in Xigu 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 Xiqu programmes - by life segment

(among those interested in participating in Xigu activities)

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

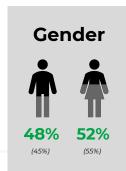
By life segment, over three-quarters of Retirees preferred classic works, whereas adaptations of work/ secondary creation and inspirational/reflective topics by internationally renowned artists were more attractive to Parents with younger children aged 0-14. Working singles, Married without children and Parents with children aged 0-4 were more interested in cross-disciplinary collaborations.

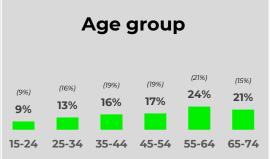
		Total	Students	Working singles	Married/c o-habited persons w/o children	Parents with children aged 0-4	Parents with children aged 5-14	Parents with children aged 15+	Retirees/ aged 65+
	Classic works	42%	34%	39%	43%	17%	26%	47%	78%
Locally renowned	creators or performers/groups	30%	20%	27%	33%	28%	32%	33%	24%
Award	d-winning/Reenactment Works	26%	21%	23%	25%	26%	26%	27%	30%
Adaptatio	on of works/Secondary creation	25%	31%	23%	21%	32%	29%	25%	16%
	Inspirational/Reflective Topics	24%	26%	24%	18%	31%	28%	23%	12%
Internationally renowned	creators or performers/groups	23%	22%	24%	20%	32%	27%	21%	15%
	Local Original/Novel Works	20%	20%	25%	18%	24%	19%	18%	21%
C	ross-disciplinary collaborations	17%	16%	23%	22%	25%	21%	14%	7 %
Programmes/Promotion	ns for Art Festivals or Book Fairs	15%	11%	12%	14%	20%	21%	15%	8%
Suitable for children to par	ticipate in/Family fun program	15%	18%	12%	12%	24%	21%	15%	4%
New Venue/Upgr	aded Venue Sound Effects, etc.	14%	10%	14%	12%	14%	10%	18%	11%
Aud	dience Interactive Participation	11%	13%	13%	4%	9%	11%	12%	6%
	Incorporation of Art-tech	6%	9%	10%	8%	4%	5%	6%	1%
	Experimental creation	2%	1%	4%	3%	2%	2%	2%	1%
Source: Q208	Sample size (n=)	2,131	141	387	770	211	412	704	149

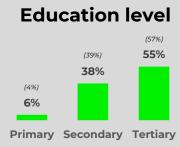
Base: Those who are interested in participating in Xigu activities

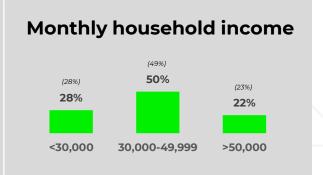
Profile of Xiqu participants

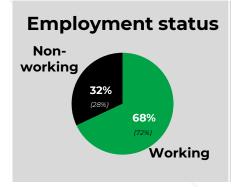
• Compared to the general population, fans of *Xiqu* tend to be aged 55+ and Parents with children aged 15+ and Retirees.

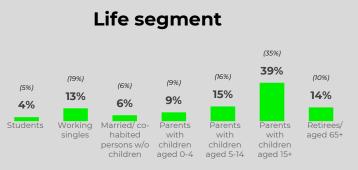


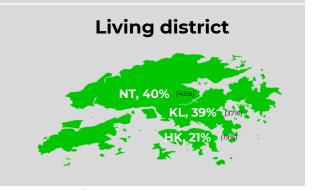














Life segments by age

		15-24	25-34	35-44	45-54	55-64	65-74
Students	5%	48%	1%	-	*	-	\ <u>-</u>
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

THANK YOU!

