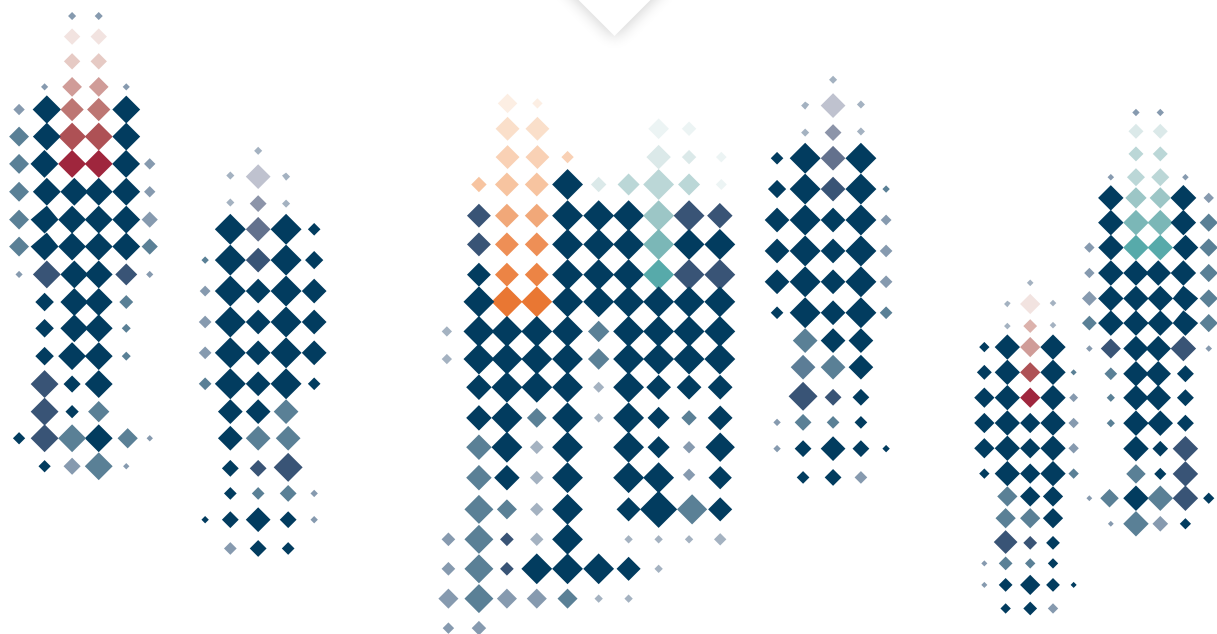


藝文活動參加者的 行為模式研究

BEHAVIOURAL STUDY ON
ARTS PARTICIPANTS

總結報告
SUMMARY REPORT





簡介

INTRODUCTION

- ◆ 由香港藝術發展局(本局)主導的「藝文活動參加者的行為模式研究」分三個階段，透過不同的研究方法，分別於2021年新冠肺炎爆發期間及2022年疫情緩和後進行研究。
- ◆ 第一階段「非實體形式參與藝術活動」的問卷調查於2021年1月進行，主要了解在新冠疫情爆發期間(2020年1月至2021年1月)，在活動場地關閉等防疫措施的限制下，本地觀眾透過非實體形式參與藝術活動的情況。問卷同時查詢疫情爆發前兩年(2018-19年)的參與情況，以作比較。
- ◆ 第二階段的座談會於2022年7至9月進行，深入探討觀眾參與藝術活動前的決策過程，包括獲取藝文活動資訊的途徑，對活動宣傳的反應，以及購票前對不同因素的考量等。
- ◆ 第三階段「藝術活動參與概況」的問卷調查於2022年8至9月進行，全面地了解市民於2021/22年的藝術參與情況，包括參與藝術活動的範疇和類別、形式、頻密度和支出。承接第一階段的調查結果，是階段的問卷調查提出以下問題：2020年的主要藝術活動參與形式—非實體形式(如網上、收費電視或DVD等)，於2021/22年在多大程度延續下來？就實體形式的藝術參與情況，是階段研究結果與本局於2014/15年間進行的「觀賞藝文節目及消費調查」之結果作對比，了解藝文活動參加者的行為模式的變化。除此之外，有見於藝術科技日漸普及，是階段研究又加入了市民對藝術科技的認知、體驗和態度等的調查。
- ◆ 透過綜合比較分析以上三個階段的研究結果，「藝文活動參加者的行為模式研究」宏觀地分析了觀眾在過去幾年的藝術活動參與行為走勢，深入了解觀眾的心態及意見，從而為各藝團及藝術工作者提供參考建議，幫助他們於未來更好地建立及發展觀眾群。
- ◆ Initiated by the Hong Kong Arts Development Council (HKADC), the Behavioural Study on Arts Participants consists of three stages, conducted using different research methods during the COVID-19 outbreak in 2021 and the period after the pandemic eased in 2022.
- ◆ The Stage 1 survey on Alternative Modes of Arts Participation took place in January 2021. Its primary objective was to understand local audience's participation in arts activities through alternative modes during the COVID-19 pandemic (from January 2020 to January 2021), when venues were closed and other prevention measures were imposed. The survey also examined the participation in the two years immediately before the outbreak of COVID-19 (2018-19).
- ◆ Stage 2 consisted of focus group discussions held from July to September 2022. They delved into the audience's decision-making process prior to arts participation, including the channels through which they obtained information on arts and cultural activities, their responses to promotional materials, and the various factors they considered before purchasing tickets.
- ◆ The Stage 3 survey on the Patterns of Arts Participation was conducted from August to September 2022. It aimed to gain a comprehensive understanding on the public's arts participation patterns in 2021/22, including the art forms and categories of activities participated in, participation modes, participation frequency, and expenditure on arts activities. Building on the results of the Stage 1 survey, the Stage 3 survey addressed the following question: To what extent did alternative modes of arts participation (such as online, paid TV, and DVDs), which were the primary participation mode during 2020, continue in 2021/22? Specifically, for physical-mode arts participation, the Stage 3 findings were compared with those from the Arts Participation and Consumption Survey conducted by the Hong Kong Arts Development Council in 2014/15, in order to understand the behavioural changes of arts participants. In addition, given the growing popularity of arts-tech, the Stage 3 study also investigated the public's awareness and experience of, as well as attitudes towards arts-tech.
- ◆ Through comprehensive and comparative analysis of findings from the three stages, the Behavioural Study on Arts Participants gave an overview of the trends in the arts participation patterns of audience over the past few years, and examined the attitudes and opinions of arts audience. It sought to offer arts groups and practitioners references and recommendations in better establishing and developing their audience base in the future.

- ◆ 本研究以「2021/22年」表示2021年7月至2022年7月。其間，各藝文場地除了由2022年1月至4月因新型冠狀病毒疫情升溫而關閉外，其餘月份因疫情緩和而得以重開，惟各場地於重開期間仍受制於限聚令及入座率限制等防疫規定。「2020年」表示2020年1月（香港開始爆發新冠肺炎的時點）至2021年1月（第一階段調查進行的時點）；「2018-19年」表示疫情爆發前的兩年。
- ◆ In this Study, “2021/22” refers to the period from July 2021 to July 2022. During this period of time, various arts and cultural venues re-opened as the COVID-19 pandemic wound down, except from January 2022 to April 2022 when the venues were closed again due to the pandemic. During the periods when venues were re-opened, pandemic prevention measures such as group gathering bans and venue capacity limits were still imposed. “2020” refers to the period from January 2020 (the onset of COVID-19 outbreak in Hong Kong) to January 2021 (the time of the Stage 1 survey), and “2018-19” refers to the two years before the COVID-19 outbreak.
- ◆ 除另有指明外，本研究中「參與藝術活動」僅指以觀眾身份參與以下任何一種藝術範疇的活動：舞蹈（包括hip hop、爵士舞等）、戲劇、音樂（不包括流行演唱會、流行表演）、戲曲（包括曲藝演唱）、跨媒體藝術、視覺藝術、電影及媒體藝術（包括電影節及專題放映活動、自行觀賞紀錄片、獨立電影、獨立短片或媒體藝術作品等，但不包括商業影片）、文學藝術（包括閱讀文學作品及參與文學活動）。
- ◆ Unless otherwise specified, in this Study, “arts participation” refers to participation as audience in a programme of any of the following art forms: Dance (including hip hop and jazz dance), Theatre, Music (excluding pop concerts and pop shows), *Xiqu* (including Chinese operatic singing), Multi-arts, Visual Arts, Film and Media Arts (including film festivals and featured screening activities, as well as watching documentaries, independent films and short films, and media art pieces, but excluding commercial films), and Literary Arts (including Literary Reading and Literary Activities).



整體藝術活動參與之變化

CHANGES IN OVERALL ARTS PARTICIPATION

- ◆ 調查發現，3,017名受訪者中，超過四分之三（77.5%），即推算458萬15-74歲的人口，於2021年7月至2022年7月期間（2021/22年）以實體或非實體形式參與了至少一種藝術範疇的活動，不但自2020年回升，而且較2018-19年有所增加。
- ◆ The survey found that over three-quarters (77.5%) of the 3,017 respondents, equivalent to a projected population of 4.58 million individuals aged 15-74, participated in at least one art form either through physical or alternative modes during the period from July 2021 to July 2022 (2021/22). Not only did participation rebound from 2020, but it also increased compared to 2018-19.
- ◆ 單以實體或非實體形式計的參與度亦超越2018-19年。以實體形式的參與情況為例，於2014/15年，少於一半（43.9%¹）的受訪者，或推算258萬年齡介乎15至74歲的人士，曾參與至少一種藝術範疇的活動。2021/22年，參與度升至54.3%（即推算人口321萬），不僅自2020年（28.2%）大幅回升，更較2018-19年增加。
- ◆ The level of participation, whether in physical or alternative mode alone, also surpassed the 2018-19 level. For example, in terms of physical-mode participation, less than half (43.9%¹) of the respondents in 2014/15, or a projected population of 2.58 million individuals aged 15-74, had participated in at least one art form. In 2021/22, the participation rate rose to 54.3% (equivalent to a projected population of 3.21 million), marking not only a significant rebound from 2020 (28.2%), but also an increase from 2018-19.

¹ 在「觀賞藝術節目及消費調查」的研究結果報告中，連同流行表演及綜藝節目的參與計算在內之觀眾參與率為54.6%。此處報告的參與率為撇除兩者後之主要藝術範疇參與率，以便與「藝文活動參加者的行為模式研究」的調查結果作比較。

¹ In the Arts Participation and Consumption Survey report, the audience participation rate was 54.6%, with participation in pop and variety shows included. The figure reported here referred to the participation level in core art forms after excluding these two categories, in order to allow for comparison with the results of the Behavioural Study on Arts Participants.

整體藝術活動參與之變化[®]
Changes in Overall Arts Participation Incidence[®]

◆ 任何形式 Any Mode
◆ 實體形式 Physical Mode
◆ 非實體形式 Alternative Modes



[®] 注：受疫情所限，第一階段的調查(2018-19年及2020年的數據)只採用網上問卷的方式，因此受訪者的年齡層為16-64歲。

[®]Note: Affected by the pandemic, the Stage 1 survey (data for 2018-19 and 2020) was conducted exclusively online, limiting the respondents to be those aged between 16 and 64 years old.

個別藝術範疇的活動參與

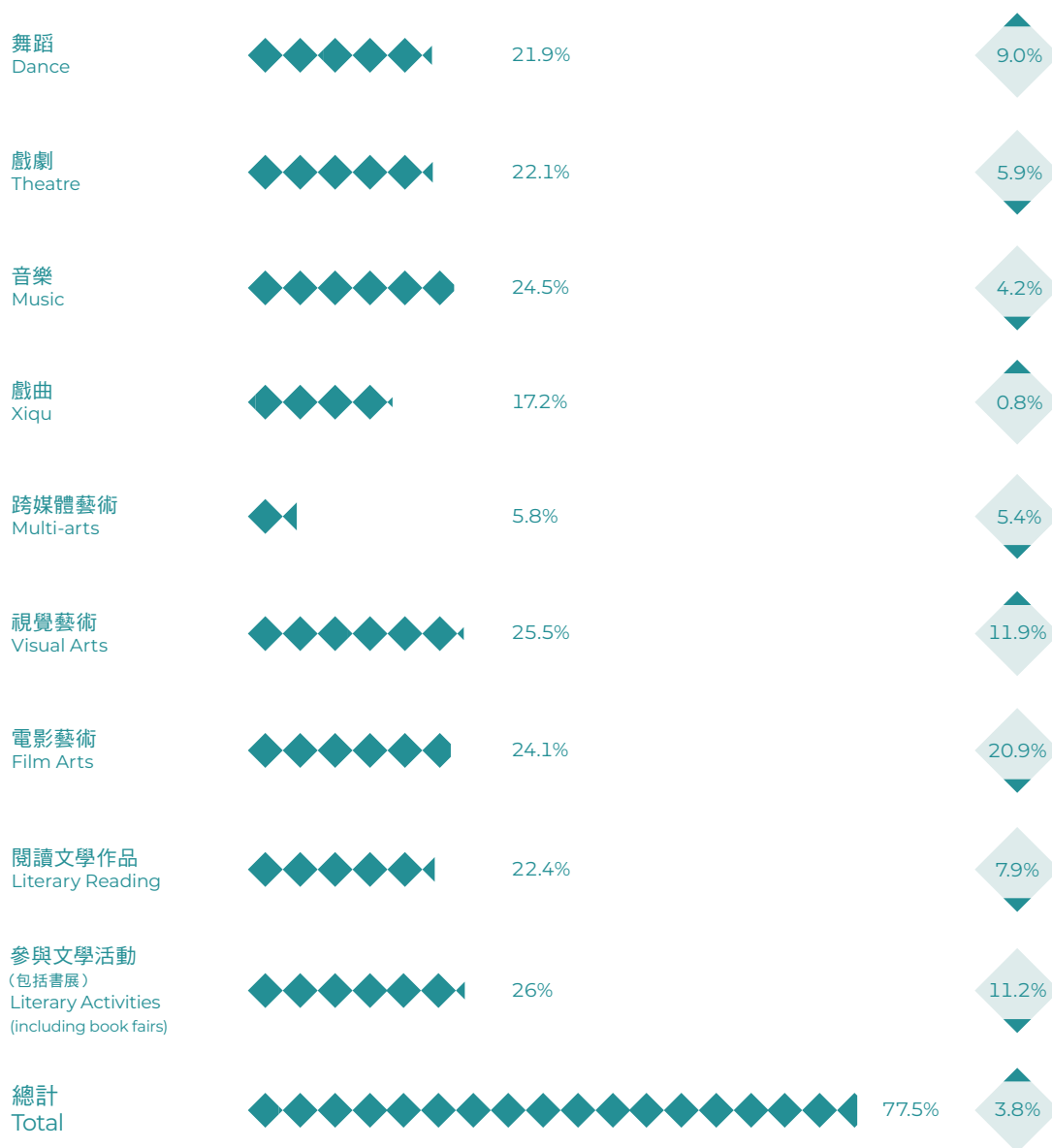
PARTICIPATION BY INDIVIDUAL ART FORM

- ◆ 於2021/22年，近一半(49%)受訪者曾透過實體或非實體形式參與多於一種藝術範疇，其中，音樂、視覺藝術、電影藝術和文學活動(包括書展)為最多受訪者所參與(24%-26%)。
- ◆ In 2021/22, nearly half (49%) of the respondents participated in more than one art form through either physical or alternative modes. Specifically, Music, Visual Arts, Film Arts, and Literary Activities (including book fairs) were the most commonly participated in by respondents (24%-26%).
- ◆ 與2018-19年比較，大部分藝術範疇的整體觀眾量於2021/22年都有所下跌，惟舞蹈和視覺藝術的觀眾錄得明顯增長，主要受到非實體形式參與的推動。
- ◆ Compared to 2018-19, most art forms saw a decline in the overall audience size in 2021/22, except for Dance and Visual Arts, which recorded significant growth in audience numbers, mainly driven by alternative modes of participation.

2021/22年的藝術參與率(任何形式) — 按藝術範疇劃分
Arts Participation Incidence (Any Mode) in 2021/22 by Art Form

表示與2018-19年度結果的差距*
Indicate gap versus 2018-19 results*

2021/22年之參與率
2021/22 Participation Incidence



推算人口 Projected Population	2021/22 4,580,858	與2018-19年相差 Gap versus in 2018-19 +1,380,328
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* 注：市民在2020年於各藝術範疇的參與率均較2018-19年下跌，詳情請參閱第一階段研究結果：《藝文活動參加者的行為模式研究—非實體形式參與藝術活動》。

* Note: The public's participation in activities of all art forms declined in 2020 compared to 2018-19. Please refer to the details in the summary of findings from the Stage 1 study "Behavioural Study on Arts Participants – Alternative Modes of Arts Participation".



- ◆ 不計算閱讀文學書籍，每名藝文活動參加者於2021/22年平均一年內，透過實體或非實體形式參與藝術節目（包括本地及非本地製作）13.8次，即每月略多於一個活動。其中，免費活動的次數（7.7次）略高於付費活動（6.2次）。
- ◆ Excluding Literary Reading, each arts participant on average participated in 13.8 arts programmes (including local and non-local productions) per year either through physical or alternative modes, i.e. slightly more than one programme per month in 2021/22. Notably, participation frequency in free activities (7.7 times) was slightly higher than that in paid activities (6.2 times).
- ◆ 戲曲活動參加者的參與頻密度較高，約每年7.8次，明顯高於其他藝術範疇活動的參加者（4.6-6.7次）。
- ◆ Participants in *Xiqu* activities showed a higher participation frequency with approximately 7.8 times per year, significantly higher than that of participants in other art forms (4.6-6.7 times).

2021/22年每年以任何形式參與藝術活動的頻密度（次）
Annual Participation Frequency (times) in Arts Activities through Any Mode in 2021/22

參與頻密度
Participation Frequency

舞蹈 Dance	6.7
戲劇 Theatre	6.2
音樂 Music	6.6
戲曲 Xiqu	7.8
跨媒體藝術 Multi-arts	5.9
視覺藝術 Visual Arts	5.2
電影藝術 Film Arts	6.3
參與文學活動 Literary Activities (包括書展) (including book fairs)	4.6

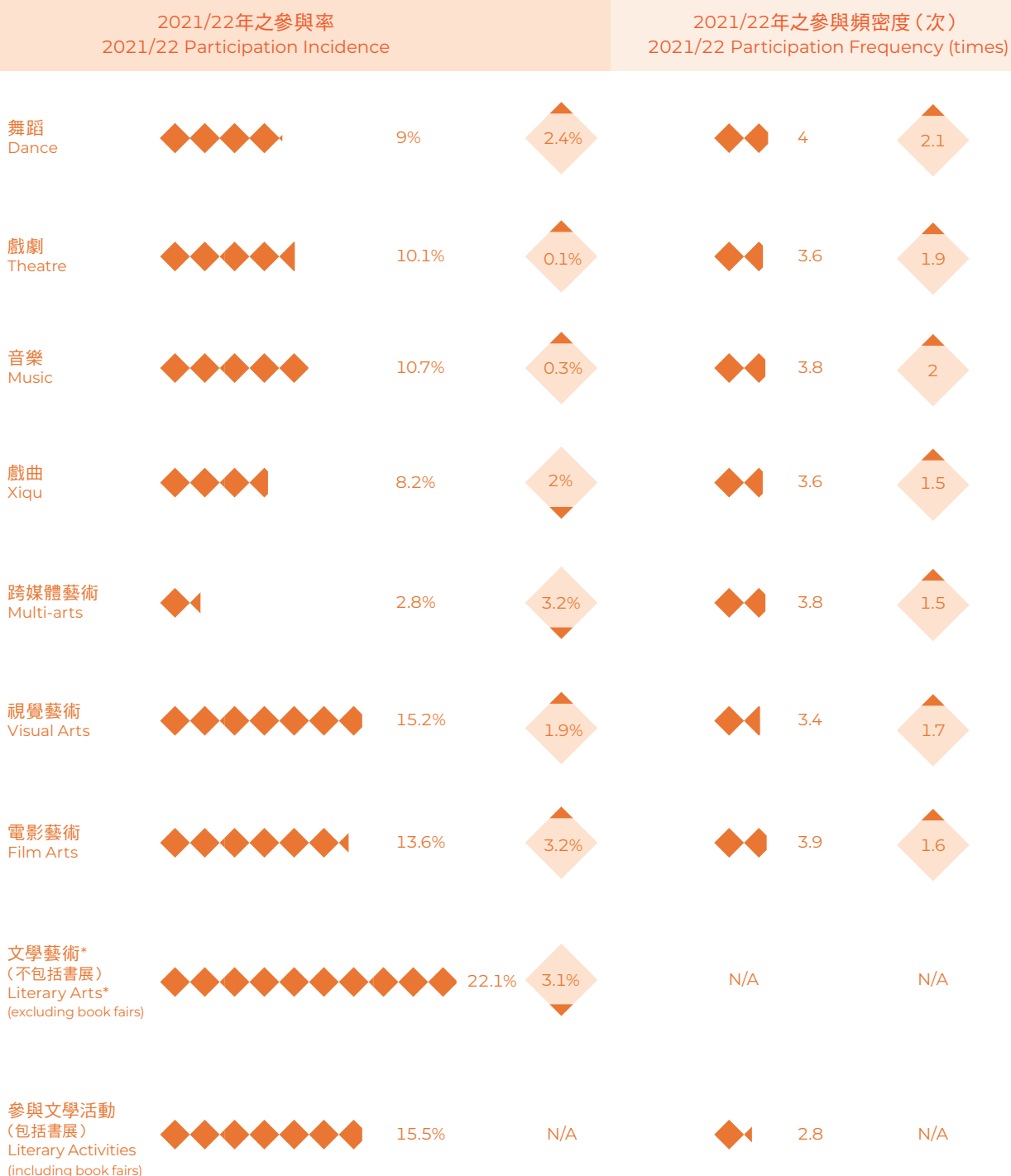
實體形式：
個別藝術範疇的參與率
及參與頻密度

PHYSICAL MODE: PARTICIPATION
INCIDENCE AND FREQUENCY BY
INDIVIDUAL ART FORM

- ◆ 實體形式的活動參與方面，於2021/22年參與電影藝術、視覺藝術和文學藝術活動（不包括書展）（14%-22%）的市民比參與表演藝術（舞蹈、戲劇、音樂、戲曲）活動（9%-11%）的市民多。
- ◆ In terms of physical-mode participation, there were more respondents who participated in Film Arts, Visual Arts, and Literary Arts (excluding book fairs) activities (14%-22%) than in Performing Arts (Dance, Theatre, Music, *Xiqu*) activities (9%-11%) in 2021/22.
- ◆ 與2014/15年度一樣，2021/22年最多人和最少人參與的藝術範疇分別為文學藝術（不包括書展）和跨媒體藝術。但是，兩者的觀眾參與度，連同戲曲，均較2014/15年下跌。其他藝術範疇活動的觀眾則有所增加（0.1%-3.2%），並以電影藝術和舞蹈節目的參與度提升相對明顯。
- ◆ Similar to 2014/15, the most and least participated art forms in 2021/22 were Literary Arts (excluding book fairs) and Multi-arts respectively. Nonetheless, these two art forms, along with *Xiqu*, experienced a decline in audience participation incidence compared to 2014/15. Audience participation in other art forms improved (0.1%-3.2%), with Film Arts and Dance programmes showing relatively notable increases in participation incidence.
- ◆ 各藝術範疇活動參加者參與實體活動的頻密度都有所增加（1.5-2.1次）。
- ◆ Participation frequency in physical-mode activities increased across all art forms (1.5-2.1 times).

2021/22年實體形式活動之參與率及參與頻密度
Physical-mode Participation Incidence and Frequency in 2021/22

表示與2014/15年度結果的差距
Indicate gap versus 2014/15 results


































* 註：為與2014/15年度比較，閱讀文學作品及參與文學活動（不包括書展）合併為文學藝術。另外，因文學閱讀的參與頻密度以閱讀書本的數量計，因此不適合與其他藝術範疇活動的參與頻密度進行比較。

* Note: To facilitate comparison with the 2014/15 findings, Literary Reading and Literary Activities (excluding book fairs) had been grouped under Literary Arts. In addition, as the participation frequency of Literary Reading was measured by the number of books read, it was not suitable for comparison with participation frequency in other art forms.

2021/22年非實體形式活動之參與率及參與頻密度
Alternative-mode Participation Incidence and Frequency in 2021/22

 表示與2020年度結果的差距
Indicate gap versus 2020 results

	2021/22年之參與率 2021/22 Participation Incidence		2021/22年之參與頻密度(次) 2021/22 Participation Frequency (times)	
舞蹈 Dance		19.1%		5.7
				
戲劇 Theatre		17.6%		5.7
				
音樂 Music		20.8%		5.9
				
戲曲 Xiqu		14.6%		7.2
				
跨媒體藝術 Multi-arts		4.7%		5.1
				
視覺藝術 Visual Arts		17%		4.7
				
電影藝術 Film Arts		18.7%		5.3
				N/A [^]
參與文學活動 (包括書展) Literary Activities (including book fairs)		16%		4.8
				

[^] 註：2020年電影藝術的調查結果因題目設定不同，不適合比較。

[^] Note: Results for Film Arts from the 2020 survey were not comparable due to differences in question design.



非實體形式： 個別藝術範疇的 參與率及參與頻密度

- ◆ 除跨媒體藝術外，市民於2021/22年透過非實體形式參與各藝術範疇活動的參與度相近（15%-21%）。
- ◆ 與2020年比較，以非實體形式觀賞舞蹈、音樂、戲曲和視覺藝術活動的觀眾量不跌反升，當中以舞蹈表演和視覺藝術展覽的增長最為突出。
- ◆ 反之，隨着電影院重新開放及取消觀眾人數限制，在線上參與電影藝術活動的人數比2020年大減。文學活動、跨媒體藝術和戲劇活動的線上參與情況亦然。
- ◆ 參與頻密度方面，除跨媒體藝術外，各藝術範疇活動參加者於2021/22年的平均參與次數均比2020年增加0.9至2.5次不等。

ALTERNATIVE MODES: PARTICIPATION INCIDENCE AND FREQUENCY BY INDIVIDUAL ART FORM

- ◆ Apart from Multi-arts, the participation incidence in alternative-mode activities was similar across various art forms (15%-21%) in 2021/22.
- ◆ Compared to 2020, there were more audiences participating in Dance, Music, Xiqu, and Visual Arts activities through alternative modes, with the most prominent growth observed in Dance performances and Visual Arts exhibitions.
- ◆ In contrast, as cinemas re-opened and venue capacity limits were lifted, the number of online participants in Film Arts activities dropped significantly compared to 2020. Similarly, Literary Activities, Multi-arts, and Theatre activities also observed a decline in online participation.
- ◆ In terms of participation frequency, except for Multi-arts, the average times of participation across the various art forms in 2021/22 grew by 0.9 to 2.5 compared to 2020.



2021/22年藝術活動的 推算年度參與人次

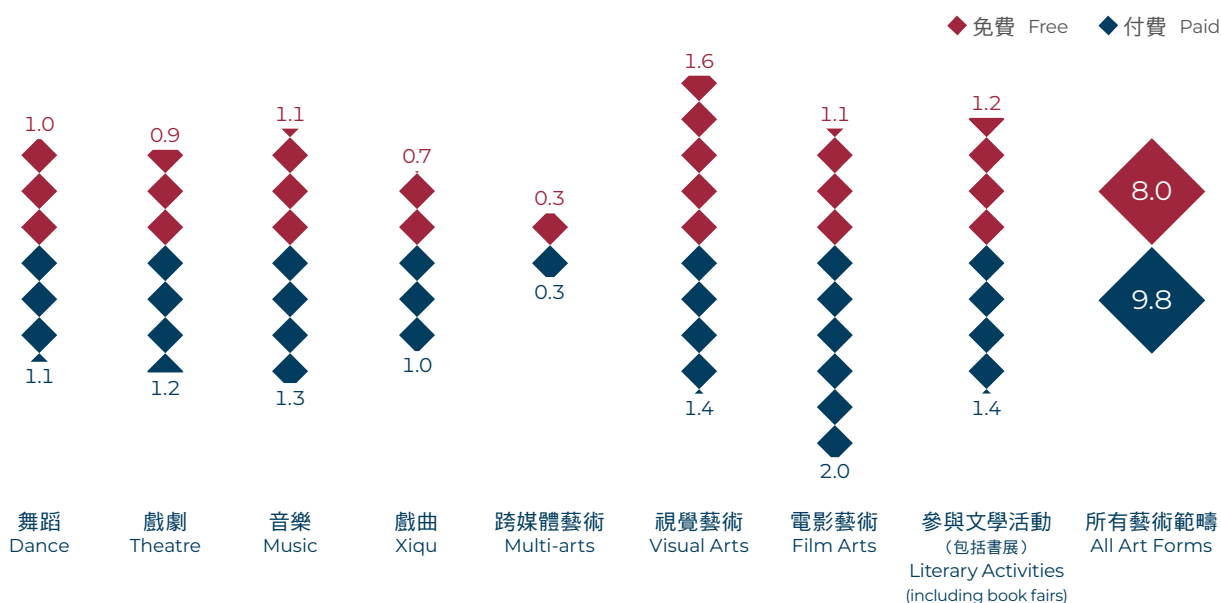
- ◆ 綜合實體及非實體形式的活動參與（不計算閱讀文學書籍），2021年7月至2022年7月期間的推算活動參與人次為6,010萬。其中，逾七成來自非實體形式的活動參與。除了因為非實體形式的參與更靈活有彈性外，亦因為新冠疫情於2022年第一季再度升溫，導致活動場地關閉和觀眾入座率受限，影響實體活動的舉辦及參與。
- ◆ 以付費和免費節目的推算年度參與人次計，實體活動方面，除視覺藝術外，其他藝術範疇推算年度參與人次多數來自付費節目。非實體形式活動的情況則相反，推算參與人次多數來自免費活動。
- ◆ 於2021/22年親身入場參與電影藝術和視覺藝術活動的推算年度參與人次最多，分別為310萬和300萬，較2014/15年多逾一倍。

PROJECTED ANNUAL ATTENDANCE FOR ARTS ACTIVITIES IN 2021/22

- ◆ Taking into account both physical and alternative modes of participation (excluding Literary Reading), the projected attendance from July 2021 to July 2022 totalled 60.1 million, with more than 70% driven by participation through alternative modes. This was not only due to the flexibility offered by alternative-mode participation, but also because the COVID-19 pandemic resurged in the first quarter of 2022, resulting in venue closures and capacity restrictions that impacted the organisation and participation in physical-mode activities.
- ◆ Looking at the projected annual attendance by paid and free programmes for physical-mode activities, apart from Visual Arts, the majority of projected annual attendance of other art forms came from paid programmes. Conversely, for alternative-mode activities, the projected attendance was primarily driven by free programmes.
- ◆ In 2021/22, the projected annual attendance for in-person activities was highest in Film Arts and Visual Arts, at 3.1 million and 3 million respectively, more than double the figures from 2014/15.

- ◆ 音樂活動的非實體形式參與自2018-19年以來逐年上升，成為2021/22年最受歡迎的藝術範疇，加上音樂活動參加者的參與頻密度高，其推算年度參與人次為各藝術範疇中最高（720萬），其付費及免費活動之推算參與人次（分別為270萬和450萬）亦為各藝術範疇之首。
- ◆ Since 2018-19, participation incidence in Music activities through alternative modes has been growing every year, making it the most popular art form in 2021/22. Moreover, given the high participation frequency of Music participants, its projected annual attendance was the highest (7.2 million) among all art forms. The projected attendances for paid and free Music activities (2.7 million and 4.5 million respectively) also surpassed those of other art forms.
- ◆ 透過非實體形式參與舞蹈活動的推算參與人次（650萬）僅次於音樂，兩者的付費活動推算參與人次（270萬）則不相上下。
- ◆ The projected attendance for alternative-mode Dance activities (6.5 million) was second only to Music, and the two art forms had a similar projected attendance for paid activities (2.7 million).
- ◆ 透過非實體形式參與戲曲活動市民雖較多數藝術範疇少，但戲曲參加者的參與頻密度卻為各藝術範疇活動參加者中最高，推高戲曲活動的推算參與人次（620萬），而其免費節目的推算參與人次（410萬）亦僅次於音樂。
- ◆ While fewer people viewed *Xiqu* programmes via alternative modes compared to most other art forms, *Xiqu* participants showed the highest participation frequency among all art form participants, contributing to a projected attendance of 6.2 million in *Xiqu* activities. The projected attendance for free *Xiqu* programmes (4.1 million) was also second only to Music.

2021/22年以實體形式參與藝術活動的推算年度人次（百萬）—免費與付費
Projected Annual Attendance (Million) for Arts Activities in Physical Mode in 2021/22 – Free vs. Paid



2021年7月至2022年7月期間以實體形式參與藝文活動的推算年度人次（百萬）：
Projected annual attendance on arts activities in physical mode from July 2021 to July 2022 (Million):

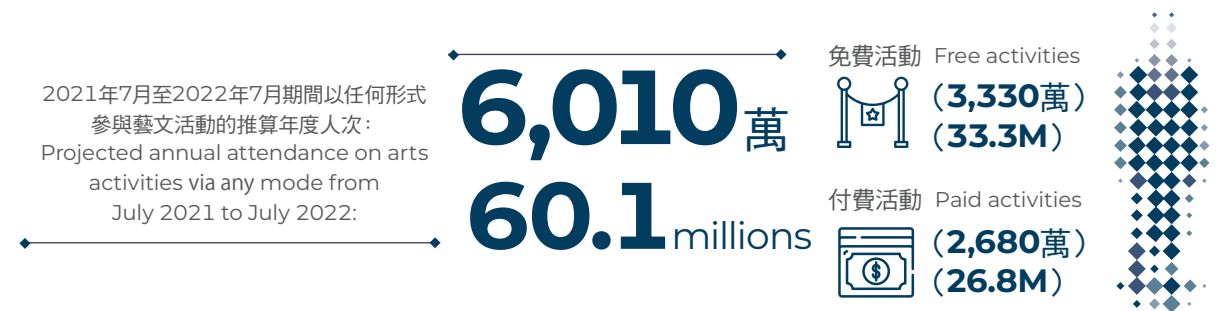
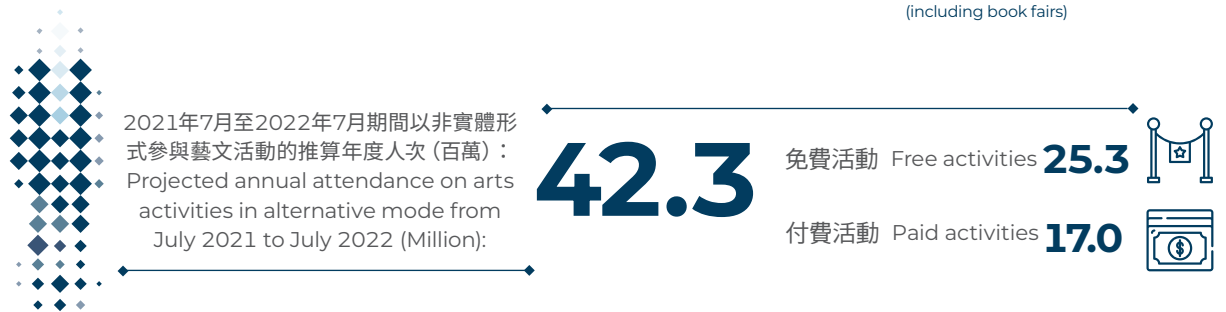
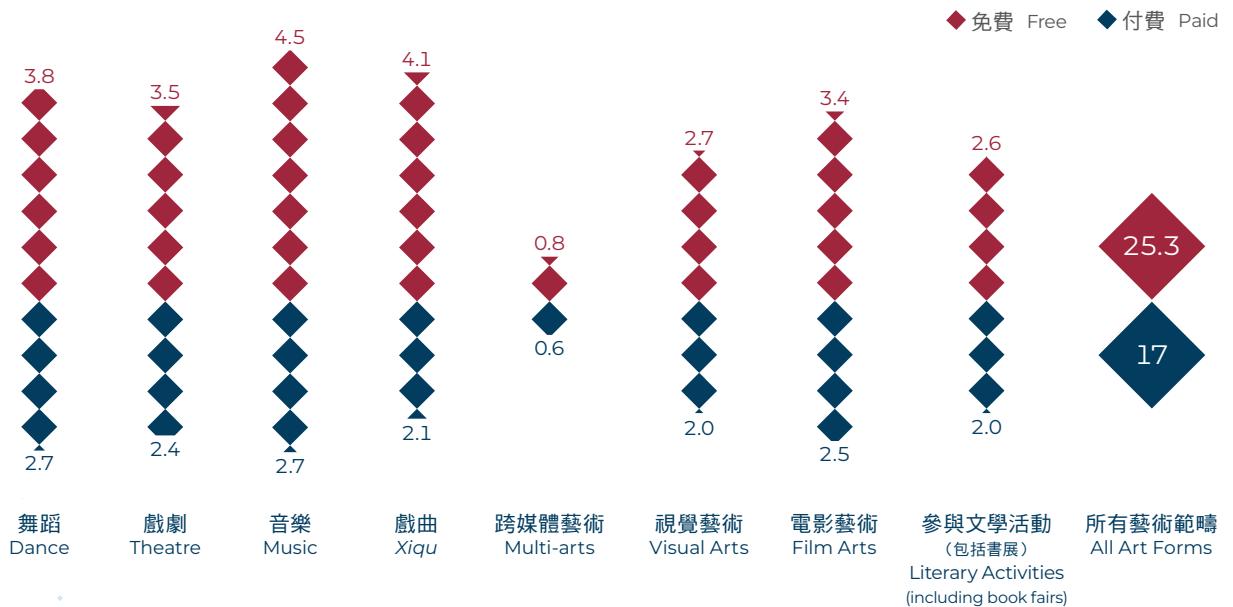
17.8

免費活動 Free activities **8.0**

付費活動 Paid activities **9.8**



2021/22年以非實體形式參與藝術活動的推算年度人次(百萬) — 免費與付費
Projected Annual Attendance (Million) for Arts Activities in Alternative Mode in 2021/22 – Free vs. Paid



平均支出

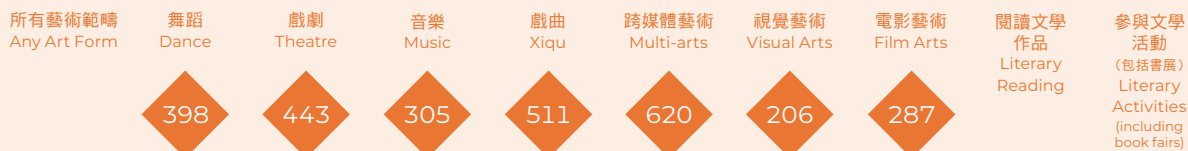
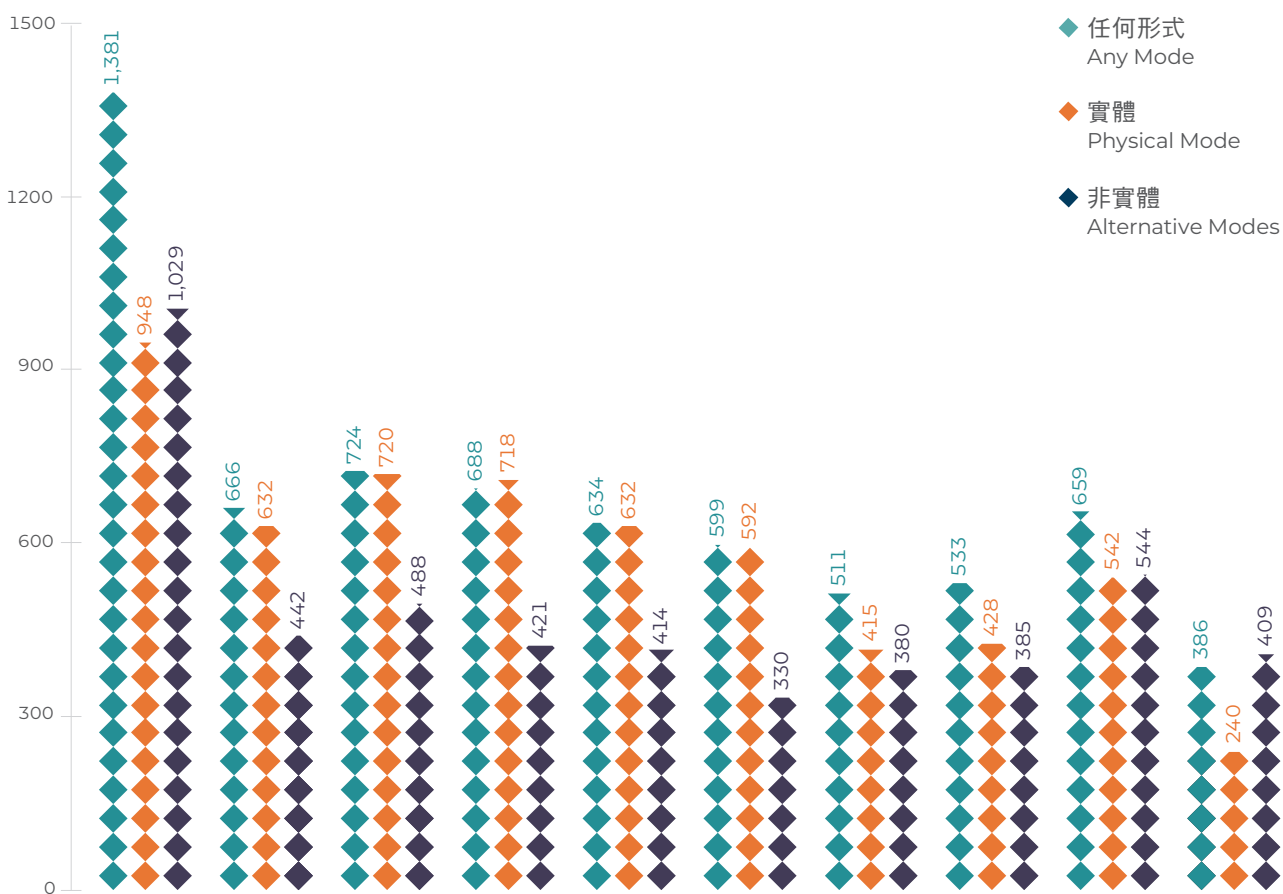
AVERAGE EXPENDITURE

- ◆ 連同實體及非實體形式的活動支出計算在內(包括購買實體文學書籍及電子書的費用), 每名藝文活動參加者於2021/22年的平均年度支出為\$1,381。整體而言, 戲劇、音樂和舞蹈活動參加者的平均支出最高。
- ◆ Considering the expenditures on both physical- and alternative-mode activities (including the costs of purchasing physical literary books and e-books), the average annual expenditure per arts participant in 2021/22 was \$1,381. Overall, participants in Theatre, Music, and Dance activities had higher average spending.



- ◆ 實體活動的藝文活動參加者的平均支出(\$948)，略低於透過非實體形式參與活動的參加者之花費(\$1,029)。
- ◆ The average expenditure of arts participants in physical-mode activities (\$948) was slightly lower than that of participants in alternative-mode activities (\$1,029).
- ◆ 就個別藝術範疇看，大多數實體形式活動的平均支出自2014/15年以來都有所增加，亦高於非實體活動的平均支出，尤其是音樂和跨媒體藝術。
- ◆ On analysis of individual art forms, most art forms saw an increase in the average expenditure on physical-mode activities compared to 2014/15. In addition, the average expenditure on physical-mode activities was generally higher than that on alternative-mode, especially for Music and Multi-arts.

2021/22年主要藝術範疇的平均年度支出 (港元)
Average Annual Expenditure for Core Art Forms in 2021/22 (HKD)



2014/15主要藝術範疇的實體活動平均年度支出
Average Annual Expenditure on Physical-mode Activities for Core Art Forms in 2014/15

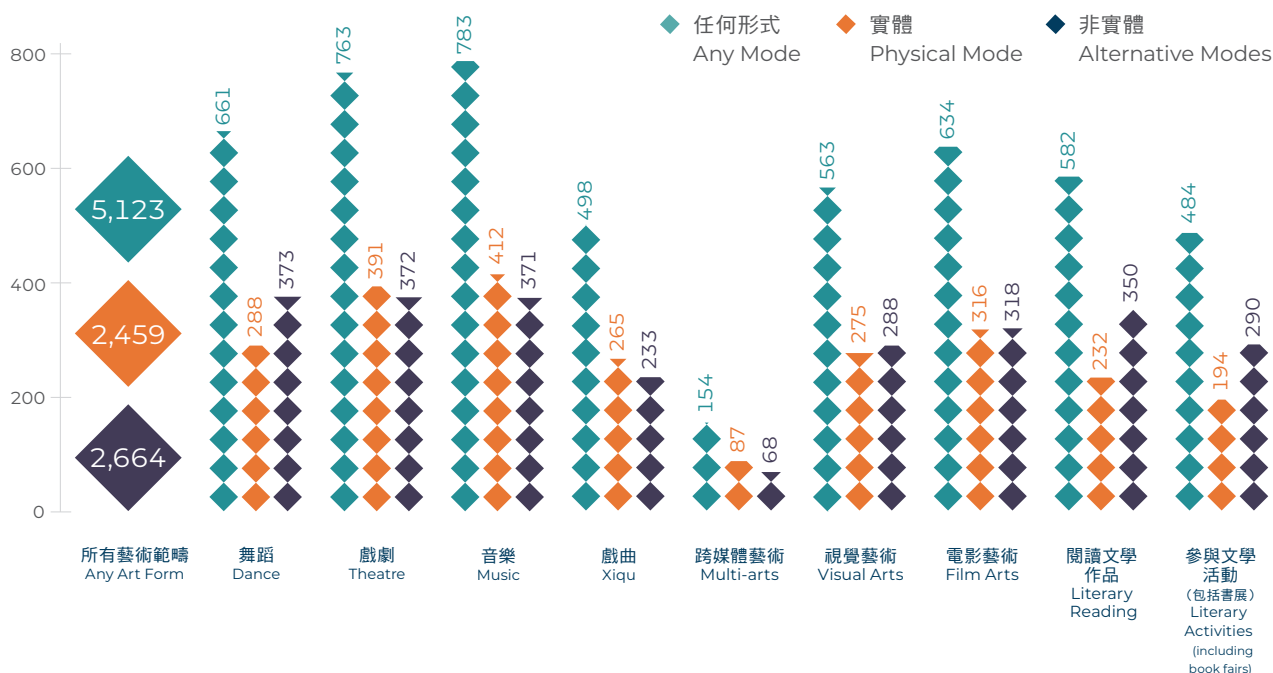
推算年度支出

PROJECTED ANNUAL EXPENDITURE

- ◆ 連同實體及非實體形式活動的推算年度支出計算在內（包括購買實體文學書籍及電子書的費用），市民於2021/22年在藝術活動的推算總支出為51億元。其中，花費在音樂、戲劇和舞蹈活動支出最大。
- ◆ 由於2021/22年實體藝術活動的參與仍受疫情所限，實體活動的年度推算總支出較非實體形式的低。舞蹈、文學閱讀和文學活動（包括書展）的情況尤其如此。
- ◆ 實體形式的活動參與方面，由於音樂和戲劇活動參加者的平均花費最高，參與人數亦較為可觀，因此這兩種藝術範疇活動的推算年度支出最高。電影藝術活動參加者的平均花費雖較低，但因其付費觀眾數目多，因此推算年度支出亦頗高。
- ◆ 非實體形式的活動參與方面，因舞蹈、音樂及戲劇的付費觀眾人數及平均花費較多，三者的推算年度支出較其他藝術範疇高。
- ◆ Considering the projected annual expenditures on both physical and alternative-mode activities (including the costs of purchasing physical literary books and e-books), the total expenditure on arts activities in 2021/22 was projected to be \$5.1 billion. Among them, spending on Music, Theatre, and Dance activities was the highest.
- ◆ In 2021/22, as physical-mode arts participation was still restricted by the pandemic, the projected annual expenditure on physical-mode activities was lower than that on alternative modes, especially for Dance, Literary Reading, and Literary Activities (including book fairs).
- ◆ For physical-mode participation, Music and Theatre had the highest average spending per participant and relatively high participant numbers, resulting in the highest projected annual expenditures for these two art forms. Meanwhile, although the average spending per participant on Film Arts activities was relatively lower, the large number of paying participants contributed to a considerable projected annual expenditure.
- ◆ For alternative-mode participation, Dance, Music, and Theatre had relatively more paying participants with higher average spending, resulting in higher projected annual expenditures compared to other art forms.

主要藝術範疇的推算年度支出(百萬港元計)

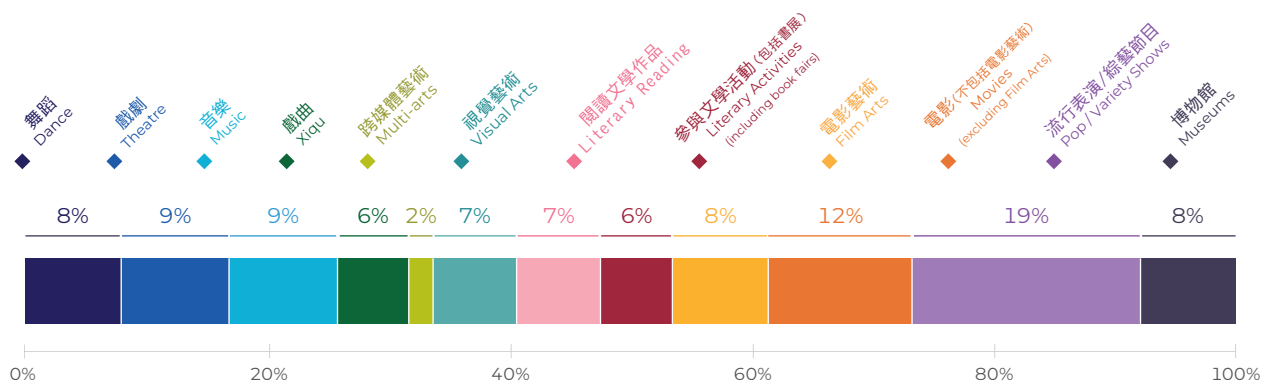
Projected annual expenditure (in million HKD) for core art forms



- ◆ 連同其他文化活動（例如看演唱會、參觀博物館和觀看商業電影）的費用計算在內，總推算年度支出為84億元，而藝術活動推算總支出（51億元）約佔整個藝文活動市場支出的六成。
- ◆ Including the expenses on other cultural activities (such as attending concerts, visiting museums, and watching commercial movies), the total projected annual expenditure was \$8.4 billion. Of the entire market expenditure on arts and cultural activities, approximately 60% came from the projected total expenditure on arts activities (\$5.1 billion).

推算支出佔比（任何形式）—按藝術範疇和購票文化活動種類劃分

Share of projected expenditure (any mode) – by art form and type of ticketed cultural activities



2021年7月至2022年7月期間以任何形式參與藝文活動的推算支出（港元）：
Projected annual expenditure (HKD) via any mode from July 2021 to July 2022:

84億
8.4 billions

藝術活動 Arts activities

(51億)
(5.1B)

購票文化活動
Ticketed cultural activities

(33億)
(3.3B)

人生階段組別分析²

LIFE SEGMENT ANALYSIS²

無子女的已婚/同居人士

Married / co-habited persons without children

- ◆ 無子女的已婚/同居人士較其他人生階段組別更熱衷於參與實體藝術活動。與2014/15年相比，該組別於各藝術範疇活動的參與都有所增長。其中，他們在戲劇（18%）和音樂（14%）活動的參與度更從以往的較低位（4%和6%）增至目前最高。
- ◆ Compared to other life segments, married / co-habited persons without children were more enthusiastic in participating in physical-mode arts activities. Their participation incidence increased across all art forms compared to 2014/15. In particular, their participation incidence in Theatre and Music activities grew from the previous lows (4% and 6% respectively) to the current record highs (18% and 14% respectively).

² 有關藝術活動的參與率、頻密度及推算年度人次/支出的人生階段組別分析，可參閱第三階段研究「市場概覽」以下頁數：28-35、48、55-57，以及個別藝術範疇報告的詳細分析。

² For a detailed analysis on the incidence, frequency, and projected annual attendance / expenditure of arts participation by life segment, please refer to pages 28-35, 48, and 55-57 of the Market Overview section, as well as the individual art form reports of the Stage 3 study.



無子女的已婚/同居人士

Married / co-habited persons without children

- ◆ 與2020年比較，該組別透過非實體形式的參與於2021/22年增加最多(+14%)，除電影藝術外的藝術範疇活動參與均有所上升。
- ◆ When compared with 2020 figures, this life segment also exhibited the highest increase (+14%) in alternative-mode participation in 2021/22, with their participation incidence rising across all art forms except Film Arts.

育有0-4歲子女的家長

Parents with children aged 0-4

- ◆ 育有0-4歲子女的家長於2021/22年的非實體活動參與較2020年顯著上升，參與度高於其他人生階段組別。他們不但在舞蹈、音樂、跨媒體藝術、電影藝術活動的參與更為活躍，而且更多以電子書的形式閱讀文學作品。
- ◆ Compared to 2020, parents with children aged 0-4 showed a significant increase in their participation in alternative-mode activities in 2021/22, with higher participation incidence than other life segments. They did not only participate more actively in Dance, Music, Multi-arts, and Film Arts activities, but also read more literary works in the form of e-books.
- ◆ 這組別參與非實體舞蹈、戲劇、電影藝術、視覺藝術和文學活動的次數最為頻密(5.3-7次)。
- ◆ This life segment had the highest participation frequency in alternative-mode activities of Dance, Theatre, Film Arts, Visual Arts, and Literary Activities (5.3-7 times).

育有5-14歲子女的家長

Parents with children aged 5-14

- ◆ 連同實體及非實體形式的藝術活動參與計算在內，育有5-14歲子女的家長的參與度最高，尤其是在文學活動的參與。他們亦較其他組別更多透過非實體形式參加戲劇、視覺藝術和文學活動。
- ◆ When participation in both physical- and alternative-mode arts activities was taken into account, parents with children aged 5-14 had the highest participation incidence, especially in Literary Activities.
- ◆ 這組別除了在實體音樂(4.6次)和視覺藝術(4.3次)的參與頻密度較其他人生階段組別高，他們在實體及非實體形式文學活動的參與頻密度均最為突出(分別為3.3及5.3次)。
- ◆ Apart from a higher in-person participation frequency in Music (4.6 times) and Visual Arts (4.3 times), they also participated more in Literary Activities through both physical and alternative modes (3.3 and 5.3 times respectively) than other life segments.
- ◆ 這組別在非實體戲劇和舞蹈活動的推算年度支出亦最高。
- ◆ They also had the highest projected annual expenditures on alternative-mode Theatre and Dance activities.



藝術活動參與率——人生階段組別分析摘要

Arts Participation Incidence – Life Segment Analysis Highlights



整體參與度於各人生階段組別排名第一
ranks the first in overall participation incidence across life segments



整體參與度於各人生階段組別排名第二
ranks the second in overall participation incidence across life segments



整體參與度於各人生階段組別排名第三
ranks the third in overall participation incidence across life segments



個別藝術範疇活動的參與率於各人生階段組別中最高
Indicates the highest participation incidence in specific art forms across life segments

	無子女的已婚/ 同居人士 Married / co-habited persons without children	育有0-4歲 子女的家長 Parents with children aged 0-4	育有5-14歲 子女的家長 Parents with children aged 5-14	育有15歲以上 子女的家長 Parents with children aged 15+
參與率 (實體) Participation Incidence (Physical Mode)	60% 戲劇、音樂、 文學活動 Theatre, Music, Literary Activities	55% 跨媒體藝術、視覺 藝術、電影藝術、 文學閱讀 Multi-arts, Visual Arts, Film Arts, Literary Reading	57%	
參與率 (非實體) Participation Incidence (Alternative Modes)		80% 舞蹈、音樂、跨媒 體藝術、電影藝 術、文學閱讀 Dance, Music, Multi-arts, Film Arts, Literary Reading	78% 戲劇、視覺藝術、 文學活動 Theatre, Visual Arts, Literary Activities	59%
參與率 (實體+非實體) Participation Incidence (Physical + Alternative Modes)	戲劇、文學閱讀 Theatre, Literary Reading	87% 舞蹈、音樂、跨媒 體藝術、視覺 藝術、電影藝術 Dance, Music, Multi-arts, Visual Arts, Film Arts	90% 文學活動 Literary Activities	79%



參與頻密度及推算年度支出——人生階段組別分析摘要

Participation Frequency and Projected Annual Expenditure – Life Segment Analysis Highlights



個別藝術範疇活動的參與頻密度/推算年度支出於各人生階段組別中最高

Indicates the highest participation frequency / projected annual expenditure in specific art forms across life segments

	育有0-4歲子女的家長 Parents with children aged 0-4	育有5-14歲子女的家長 Parents with children aged 5-14	育有15歲以上子女的家長 Parents with children aged 15+
參與頻密度 (實體) Participation Frequency (Physical Mode)		音樂、視覺藝術、文學活動 Music, Visual Arts, Literary Activities	戲劇、文學閱讀 (書籍本數) Theatre, Literary Reading (number of books read)
參與頻密度 (非實體) Participation Frequency (Alternative Modes)	舞蹈、戲劇、電影藝術、視覺藝術、文學活動 Dance, Theatre, Film Arts, Visual Arts, Literary Activities	文學活動 Literary Activities	文學閱讀 (書籍本數) Literary Reading (number of books read)
推算年度支出 (實體) Projected Annual Expenditure (Physical Mode)			所有藝術範疇 All art forms
推算年度支出 (非實體) Projected Annual Expenditure (Alternative Modes)		戲劇、舞蹈、跨媒體藝術、視覺藝術 Theatre, Dance, Multi-arts, Visual Arts	音樂、戲曲、電影藝術、文學閱讀、文學活動 Music, Xiqu, Film Arts, Literary Reading, Literary Activities

育有15歲以上子女的家長

Parents with children aged 15+

- ◆ 育有15歲以上子女的家長較常親身參與戲劇活動(4.3次)。他們亦較熱衷於文學閱讀。無論是實體文學書籍(7.3本)或是電子書(7.8本)的閱讀本數上,這組別的閱讀量均較高,亦經常以非實體形式參與戲曲活動,參與度與頻密度(8.4次)僅次於退休人士/65歲以上人士(8.7次)。
- ◆ Parents with children aged 15+ participated more frequently in Theatre (4.3 times) through physical mode. They were also more avid in Literary Reading, having the highest number of books read for both physical literary works (7.3 books) and e-books (7.8 books). This life segment participated frequently in alternative-mode Xiqu activities as well, with a participation incidence and frequency (8.4 times) second only to retirees / persons aged 65+ (8.7 times).
- ◆ 不論實體或非實體形式,這組別在各藝術範疇活動(非實體形式的跨媒體藝術活動除外)的推算年度參與人次都高於其他組別。
- ◆ Regardless of physical or alternative modes, the projected annual attendance for this group in all art forms (except alternative-mode Multi-arts activities) was higher than that of other life segments.
- ◆ 這組別在各藝術範疇實體活動的推算年度支出所佔比例都最大,在非實體音樂活動及購買電子文學書籍的推算支出上亦最為突出。
- ◆ This group accounted for the largest share of projected annual expenditure on physical-mode activities across all art forms. Their projected expenditures on alternative-mode Music activities and purchasing literary e-books were also the highest.

對藝術科技的認識、 體驗和看法

AWARENESS, EXPERIENCE AND ATTITUDES TOWARDS ARTS-TECH



- ◆ 第三階段的調查結果顯示，八成的受訪者表示曾聽聞過藝術科技，當中的七成人表示，他們希望藝術活動能夠提供宣傳短片，以展示藝術科技是如何與該藝術活動結合。

- ◆ Results from the Stage 3 survey found that 80% of respondents indicated that they were aware of arts-tech. Among them, 70% expressed a desire for arts activities to provide promotional videos demonstrating how arts-tech is incorporated into the activities.

20%
不認識藝術科技
Unaware of arts-tech



基數：所有受訪者（樣本數=3,017）
Base: All respondents (n=3,017)

80%
認識藝術科技
Aware of arts-tech

70%

希望藝術活動能提供宣傳短片
以助了解藝術活動是如何與藝術科技結合
expressed a desire for arts activities to
provide promotional videos demonstrating
how arts-tech is incorporated into the activities.

- ◆ 逾七成（72%）的藝文活動參加者曾透過實體或非實體形式體驗藝術科技，當中，多數的人表示藝術科技改善了他們的藝術活動體驗。因此，超過七成體驗者（74%）表示，他們在選擇藝術活動時會留意藝術科技是否應用在藝術活動中。

- ◆ 72% of arts participants had experience with arts-tech through either physical or alternative modes. Among them, 60% expressed that arts-tech helped enhance their experience in arts activities. As a result, 74% of those who had experienced arts-tech indicated that they would pay attention to whether arts-tech was incorporated when choosing arts activities.

28%
未曾體驗藝術科技
Not yet experienced arts-tech



基數：各藝術範疇的藝文活動參加者（樣本數=2,405）
Base: Participants of each respective art form (n=2,405)

72%
曾體驗藝術科技
Experienced arts-tech

74%

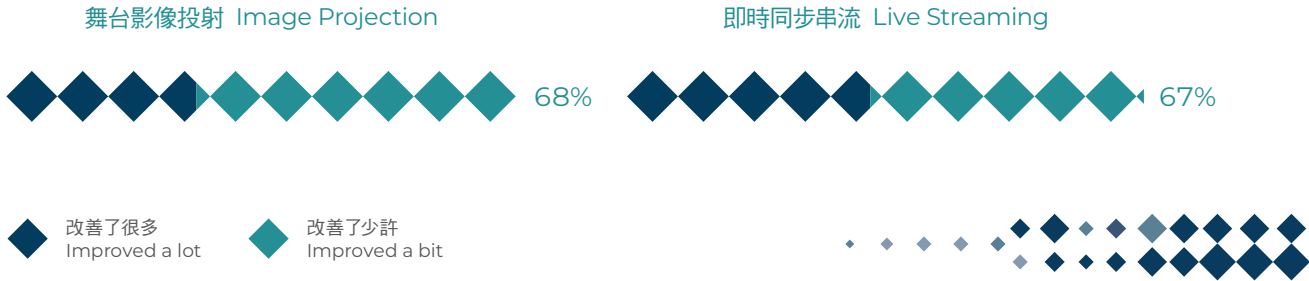
同意選擇藝術活動時
會留意藝術科技是否應用在藝術活動中
indicated that they would pay attention to
whether arts-tech was incorporated when
choosing arts activities.

- ◆ 同步串流和舞臺影像投射較常在表演藝術活動中所應用，因此較多被舞蹈、戲劇和音樂活動參加者所體驗，亦是反應最為正面的兩種藝術科技。沉浸式影像裝置和虛擬實景則最廣為視覺藝術參加者所體驗。

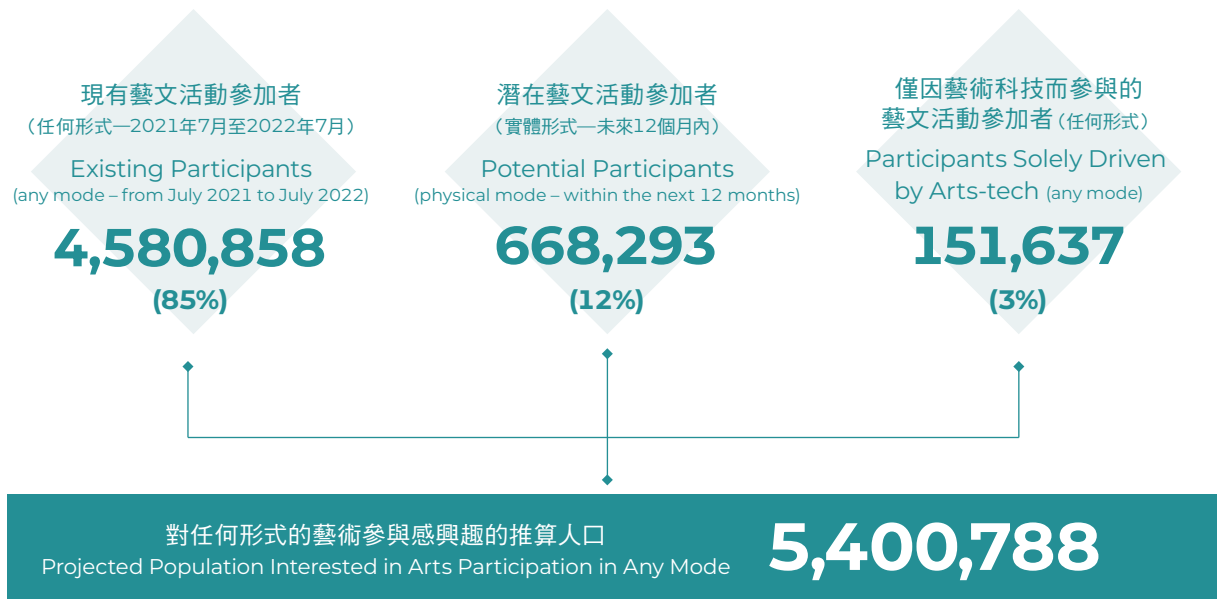
- ◆ Live Streaming and Image Projection were more commonly used in Performing Arts activities, and were therefore most experienced by participants in Dance, Theatre, and Music activities. These two arts-tech elements also received the most positive feedback from the participants. Meanwhile, Immersive Video Installations and Virtual Reality were most commonly experienced by Visual Arts participants.

藝術科技對藝文活動參加者藝術體驗的影響

Impact of arts-tech on participants' arts experience



- ◆ 雖然藝術科技有助改善藝術參與體驗，但第二及第三階段的研究結果均顯示，這並不是觀眾最關注的元素，而經典作品、具啟發性/引人反思的題材，以及本地/國際知名創作或表演者/團體的吸引力遠高於藝術科技。
- ◆ While arts-tech helped improve the experience of arts participation, results from both the Stage 2 and Stage 3 studies showed that it was not the primary concern for audience. Instead, classic works, inspirational or reflective topics, and locally or internationally renowned creators, performers or groups were more appealing than arts-tech.
- ◆ 以推算人口計，撇除458萬透過實體或非實體形式參與藝術活動的市民，以及約67萬表示有興趣參與實體藝術活動的非參加者，僅因藝術科技而對藝文活動產生興趣的市民只有15萬。這是由於大多數對藝術科技感興趣的人本身已是現有或潛在的藝文活動參加者。
- ◆ In terms of projected population, excluding 4.58 million existing arts participants who participated either through physical or alternative modes, and approximately 670,000 non-participants interested in physical-mode arts activities, only 150,000 individuals were interested in arts and cultural activities solely because of arts-tech. This was because most people who expressed interest in arts-tech were existing or potential participants in arts and cultural activities.





公眾希望未來親身入場參與更多的藝術活動

Public Desire for More In-person Participation in Future Arts Activities

- ◆ 受疫情所限，2021年7月至2022年7月期間藝術活動的推算總參與人次（不計算閱讀文學書籍），和推算總年度支出（包括購買實體文學書籍及電子書的費用），多數來自非實體形式的藝術參與。可見，以非實體形式參與藝術活動的觀眾不但數目龐大，而且願意花費。
- ◆ 雖仍受疫情所限，於2021/22年間親身入場參與藝術活動的15-74歲推算人口達321萬，較2014/15年增加62萬，顯示參與實體節目的人口呈上升趨勢。另外，於2021/22年間沒有親身入場參與藝術活動但表示未來有此興趣的推算人口達204萬，較2014/15年的77萬增加127萬。
- ◆ 2021/22年，表演/展覽場地重開，觀眾恢復了親身入場觀賞節目/展覽的意欲。第一及第三階段的追蹤調查顯示，有意在未來12個月內親身入場參與藝術活動的受訪者，由2020年的74%增加至2021/22年的85%。其中，於2021/22年度僅透過非實體形式參與藝文活動的參加者（推算為138萬人口）的興趣程度更高達95%³。
- ◆ 另外，2020年的防疫措施限制了外國表演團體來港表演，使觀眾比疫情前更關注本地的藝文活動。因此，如可將這些觀眾吸納為本地實體藝文活動的觀眾，潛在收益將不容小覷。
- ◆ Due to the pandemic, the projected total attendance in arts activities (excluding Literary Reading), and the projected total annual expenditure (including the costs of purchasing physical literary works and e-books) from July 2021 to July 2022 were primarily driven by alternative-mode arts participation. This indicated that the audience who participated in arts activities through alternative modes were not only numerous but also willing to spend.
- ◆ Despite the ongoing pandemic, the projected population aged 15-74 who attended in-person arts activities in 2021/22 totalled 3.21 million, an increase of 620,000 compared to 2014/15, which suggested a rising trend in the physical-mode participant population. Furthermore, the projected population of those who did not attend in-person arts activities in 2021/22 but expressed interest in doing so in the future reached 2.04 million, an increase of 1.27 million compared to 770,000 in 2014/15.
- ◆ In 2021/22, with the re-opening of performance / exhibition venues, the audience regained desire to attend programmes / exhibitions in person. Based on the tracking surveys from Stage 1 and Stage 3, the proportion of respondents who expressed interest in attending in-person arts activities in the next 12 months grew from 74% in 2020 to 85% in 2021/22. Among them, the interest level of those who participated in arts and cultural activities exclusively through alternative modes in 2021/22 (with a projected population of 1.38 million) was even higher, reaching 95%³.
- ◆ In addition, pandemic prevention measures in 2020 restricted overseas performing groups from visiting Hong Kong, prompting audiences to focus more on local arts and cultural events than before the pandemic. If these audiences could be attracted to attend local arts and cultural activities in physical mode, it could yield considerable potential revenue.

³ 有關受訪者對未來親身入場參與藝術活動的興趣程度，可參閱第三階段研究「市場概覽」以下頁數之詳細內容：36、40-43、77，以及個別藝術範疇報告中，關於各藝術範疇子分類現有參加者和感興趣參加者的分布。

³ For details on the respondents' interest in attending in-person arts activities in the future, please refer to pages 36, 40-43, and 77 of the Market Overview section, as well as the distribution of existing and potential participants in each arts subcategory in the individual art form reports of the Stage 3 study.



觀眾對藝術活動的期望

Audience Expectations towards Arts Activities

- ◆ 本地實體藝文節目的市場潛力巨大，那麼如何才能吸引觀眾入場呢？第二階段座談會中，觀眾對藝術節目、藝團和表演者/藝術家提出以下一些期望⁴。

- ◆ The market potential for local physical-mode arts and cultural programmes is enormous. So how can we attract audiences to attend? Below are what audiences from the focus groups of the Stage 2 study expect on arts programmes, arts groups, and performers / artists⁴.

題材 Topic

- ◆ 具啟發性/引人反思 Inspirational / reflective
- ◆ 與香港本土相關 Related to Hong Kong

- ◆ 經典作品以及獲獎/重演作品 Classic works, and award-winning / re-run programmes
- ◆ 本地知名創作/表演者的作品 Works by locally renowned creators / performers
- ◆ 具口碑 Reputable

質素 Quality

美感 Aesthetics

- ◆ 從舞台、表演（尤其是舞蹈表演）、服飾（尤其是戲曲表演中的服裝和頭飾）到海報的設計上都呈現美感
Showing aesthetic appeal from stage sets, performances (especially Dance performances), costumes (especially the clothing and headpieces used in Xiqu performances), to poster design

⁴ 可參閱第二階段的座談會報告，了解觀眾對個別藝術範疇的詳細建議。

⁴ For detailed recommendations made by audiences in the focus group discussions on individual art forms, please refer to the Focus Group Reports of the Stage 2 study.

互動
Interactivity

表演/展覽期間 During the Performance / Exhibition

- ◆ 融入互動元素，加強觀眾和表演者/藝術家/展品的連結
Containing interactive elements to strengthen the connection between the audience and performers / artists / exhibits

表演後 After the Performance

- ◆ 表演者/藝術家可透過社交媒體持續更新動態，增加與觀眾的日常互動及親和力
Performers / artists may use social media to provide regular updates, enhancing their day-to-day interaction and rapport with the audience

表演藝術節目 Performing Arts Programmes

- ◆ 透過展示排練、預演、過往演出的片段，或小型表演，讓觀眾增加對演出的了解
Enhancing audience understanding of the performances by showcasing rehearsals, previews, clips from past performances, or conducting mini-shows

視覺藝術展覽 Visual Arts Exhibitions

- ◆ 宣傳品應包括各種有關展覽的資訊，包括展覽規模等，讓觀眾能有充足的資訊作出決定及合理期望
Promotional materials should include various information about the exhibitions, such as the exhibition scale, allowing the audience to make informed decisions and manage their expectations

宣傳
Promotion





**第一階段研究
非實體形式參與藝術活動之調查報告**

Stage 1
Survey Report on Alternative
Modes of Arts Participation



**第二階段研究
座談會報告**

Stage 2
Focus Group
Report



**第三階段研究
藝術活動參與概況之調查結果**

Stage 3
Survey Report on Patterns
of Arts Participation





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