

ARTS PARTICIPATION AND CONSUMPTION SURVEY

Executive Summary

prepared for

Hong Kong Arts Development Council



by

Consumer Search Hong Kong Limited (CSG)

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Background of the Study

- E1. Audience development is one of the most important objectives pursued by the local arts sector of Hong Kong. Different arts institutions and organisations collect feedbacks from their audiences to understand the audiences' programme preferences and exposure to respective publicity. Most of these findings, however, are insufficient to reflect the overall behavioural patterns of audiences and to shed light on those who do not participate in the programmes.
- E2. For arts institutions and organisations attempting to design and implement effective audience building strategies, an in-depth understanding of the arts participants and potential arts participants is needed. Information and analysis on how and why individuals are likely to engage with the arts, how they spend their leisure time and money, what attracts their attention, and what existing and potential opportunities are available to reach out to new audience etc., are crucial for catering to different types of arts participants and for incentivising non-participants to engage with the arts.

Study Objectives

- E3. With the support of the Home Affairs Bureau, the Hong Kong Arts Development Council (ADC) had appointed Consumer Search Hong Kong Limited (CSG) to undertake the Arts Participation and Consumption Survey (the Study) to collect information that was relevant and useful for formulating strategies/ measures to:
- identify, profile, enhance and expand arts participation; and
 - produce arts indicators for understanding the arts development in Hong Kong.

Study Methodology

- E4. The Study covered ten art forms, including eight core art forms (Dance, Theatre, Music, Xiqu, Multi-arts, Visual Arts, Film and Media Arts, and Literary Arts) and two non-core art forms (Pop Show and Variety Show).
- E5. The Study consisted of five parts:
- *Part 1 – Desktop Research*

A desktop research was conducted to review the areas of investigation and analytical frameworks of similar studies in major cities around the world. The information collected served as broad inputs for designing the survey instruments and analysis outline of the Study.

- *Part 2 - Pre-survey Focus Group Discussions*

A total of four focus group discussions were conducted with a well mix of participants and non-participants of particular art forms to gauge the general public's perceptions, attitudes, interests, motivations and barriers of arts participation as well as their suggestions for encouraging people to participate in arts activities. The outputs facilitated the design of the Questionnaire Survey.

- *Part 3 - Pre-survey In-depth Interviews with Arts Activity Presenters and Academia*

Two in-depth interviews were conducted with experienced industry practitioners, one representing arts activity presenters and another, academia, to gauge inputs for the questionnaire design and their views towards overall arts development in Hong Kong.

- *Part 4 - Questionnaire Survey*

The Questionnaire Survey aimed to identify the number, demographic profiles, behaviour and attitudes of arts participants and barriers of non-participants.

- The target respondents were people aged 15-74 who mainly resided in Hong Kong in the past two years, excluding foreign domestic helpers. The sample was then projected to the Hong Kong population of 5,878,000 aged 15-74.¹
- Street intercept face-to-face interviews were conducted across 18 administrative districts in Hong Kong. To ensure that the sample was representative of the Hong Kong population, weighting was applied to the sample to reflect the distribution of age, gender and occupation of the Hong Kong population according to the "Hong Kong Annual Digest of Statistics 2014".² The percentages of respondents calculated in the report have taken into account such weighting.

¹ The information was sourced from the "Hong Kong Annual Digest of Statistics 2014", available at <http://www.censtatd.gov.hk/hkstat/sub/sp140.jsp?productCode=B1010003>

² Published by the Hong Kong Census and Statistics Department, available at <http://www.censtatd.gov.hk/hkstat/sub/sp140.jsp?productCode=B1010003>

- Fieldwork took place from 1 September to 8 October 2015 and a total of 3,016 interviews were conducted, representing a response rate of 20.6%. At the beginning of the questionnaire, all respondents were asked whether they had attended any activity of each of the ten art forms in Hong Kong in the past 12 months. Among the 3,016 respondents, 1,634 had participated in at least one art form with respective incidences as follows, while 1,382 had not participated in any one of the art forms.

Art Form	Incidence of Arts Participation
Dance	196
Theatre	286
Music	302
Xiqu	295
Multi-arts	159
Pop Show	700
Variety Show	347
Visual Arts	376
Film and Media Arts	284
Literary Arts	732

N= 3,016

- Each respondent then answered an in-depth questionnaire either for one of the art forms he/ she participated (as a participant), or for one of the art forms he/ she had not participated (as a non-participant), as automatically assigned by a survey programme. The survey programme made reference to the results of a pre-survey pilot study, which was conducted to estimate the rarity of participation for each of the ten art forms. The rarer the participation, the higher the chance the art form would appear in the survey programme. This ensured that each art form can be represented in the street intercept face-to-face interviews. Answering a questionnaire of one art form could also avoid respondent fatigue due to lengthy interview.
- The breakdown of completed interviews for each art form among participants and non-participants is as follows:

Art Form	Total Respondents	Arts Participants	Arts Non-participants
Dance	292	118	174
Theatre	287	113	174
Music	288	113	175
Xiqu	318	148	170
Multi-arts	289	114	175
Pop Show	336	171	165
Variety Show	280	124	156
Visual Arts	288	113	175
Film and Media Arts	294	118	176
Literary Arts	344	164	180
Total	3,016	1,296	1,720

- *Part 5 - Post-survey Deep-dive Focus Group Discussions*

A total of four focus group discussions were conducted with a well mix of participants of different age groups, gender and education levels and of different art forms to collect suggestions or in-depth thoughts on how to promote the arts industry and to attract participation in various art forms.

E6. In this document, subgroup analyses with sample bases smaller than 10 are not shown, while those with sample bases more than 10 but fewer than 30 are marked with asterisk (*).

Arts participants generally refer to arts attendees (those who have attended arts programmes/ exhibitions in person). However, other forms of arts participation (e.g. arts learning) are specified where applicable.

Key Findings

E7. The key findings of the Study are as follows:

- *Arts Participants*
 - Slightly over half (54.6%) of the total respondents participated in at least one of the ten art forms in the past 12 months, with Literary Arts (25.1% of total respondents) and Pop Show (23.2% of total respondents) being the most participated art forms.

- Among the arts participants, around one-third took part in at least one art form (31%), another one-third in at least three art forms (32.8%) and less than one-fifth in two art forms (16.5%). All these three groups participated in at least one core art form.
 - On average, each arts participant took part in arts activities for 3.4 times in the past 12 months, and the total direct expenditure spent was projected to be about HK\$3 billion.
 - Most arts participants considered entertainment/ relaxation as a benefit of arts participation. However, the drivers or motivators for arts participation varied across arts participants.
- *Arts Non-participants*

Slightly less than half (45.4%) of the total respondents had not participated in any of the art forms in the past 12 months. Among the arts non-participants, 28.8% and 29.2% were most interested in one core art form and Pop Show/ Variety Show respectively, whereas 42.0% were not interested in any art form. Non-participants of different art forms cited different reasons for not participating in arts.
- *Potential Arts Audience*

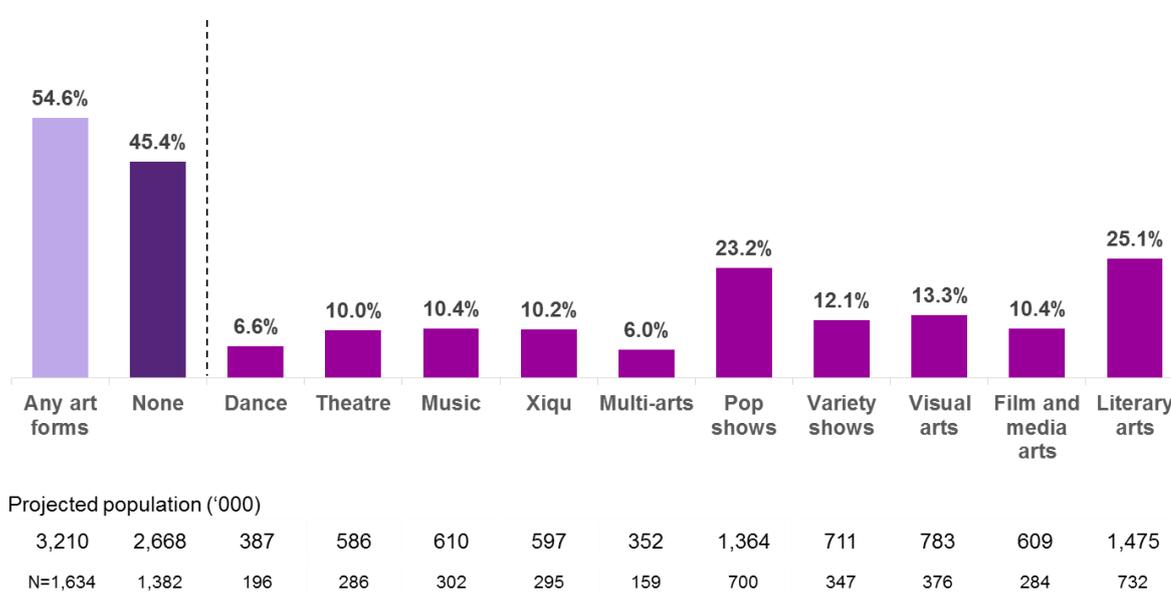
Two types of people could potentially be converted to become participants of one or more core art forms.

 - Participants who took part only in Pop Show/ Variety Show or non-participants who were most interested in Pop Show/ Variety Show: this segment was large in size and had experience or interest in stage performances.
 - Non-participants who were most interested in one of the core art forms. They did not participate in any arts activities in the past 12 months mostly because they were uninformed and unaware of the arts activities. In particular, the mature segment were most interested in Xiqu, whereas the student segment were interested in other arts activities.
- Detailed findings are outlined in Sections I to V, with recommendations given to encourage wider arts participation. The findings summarise the results of the Questionnaire Survey and the Post-survey Deep-dive Focus Group Discussions, and the recommendations are made based on these results.

I. Market Structure of Arts Participants and Non-participants

E8. A total of 3,016 respondents were asked about their participation in one of the ten art forms between October 2014 and September 2015 (12 months). Slightly over half (54.6%) of the respondents, or a projected population of 3.21 million aged 15-74, attended activities of at least one art form. Among the ten art forms, Literary Arts³ (25.1% of total respondents) and Pop Show (23.2% of total respondents) were the most popular, while Dance (6.6% of total respondents) and Multi-arts (6.0% of total respondents) were the least popular.

Exhibit 1. Incidence of arts participation in the past 12 months by art forms



Base: All respondents (N=3,016)

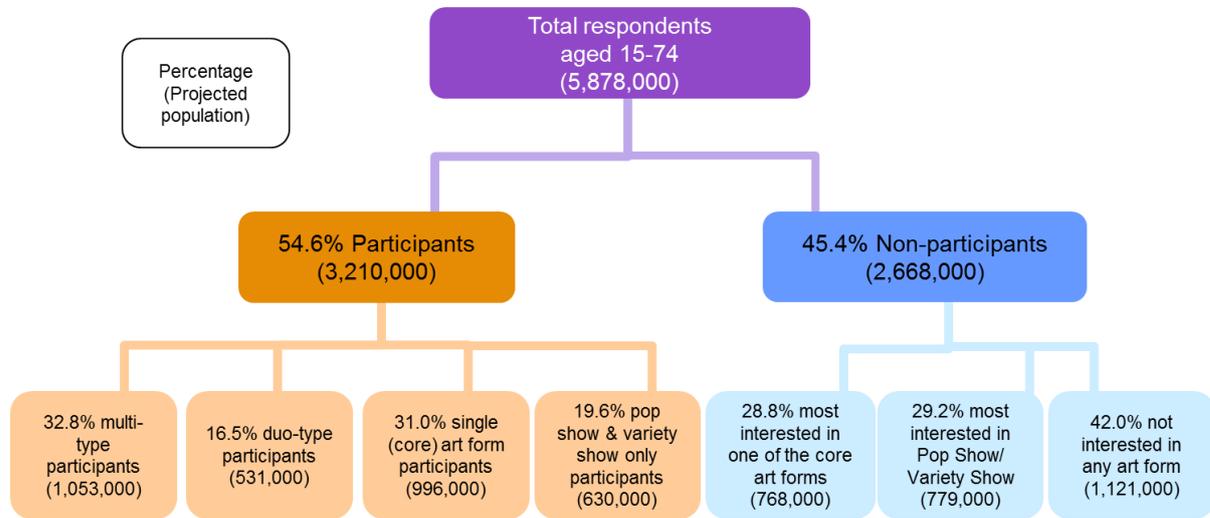
E9. The arts participants could be classified into four groups based on the number and types of art forms that they participated in. 32.8% and 16.5% of arts participants were multi-type participants (i.e. three or more art forms) and duo-type participants (i.e. two art forms) respectively; 31.0% of arts participants were single art form participants (i.e. one core art form). All these three groups of participants had participated in at least one core art form. 19.6% of arts participants participated in Pop Show or Variety Show only.

The arts non-participants, on the other hand, could be classified into three groups. Among the arts non-participants, 28.8% and 29.2% were most interested in one core

³ Participation in Literary Arts refers to reading creative writing on literature, plays, novel/ biography, prose/ reportage and poetry/ verse in out-of-home places (e.g. libraries, bookstores), attending literary seminars/ lectures, book reading groups, poetry/ verse reading groups or workshops, or participating in essay competition/ creation camp.

art form and Pop Show/ Variety Show respectively, whereas 42.0% were not interested in any art form.

Exhibit 2. Incidence of arts participation by number and types of art forms participated in

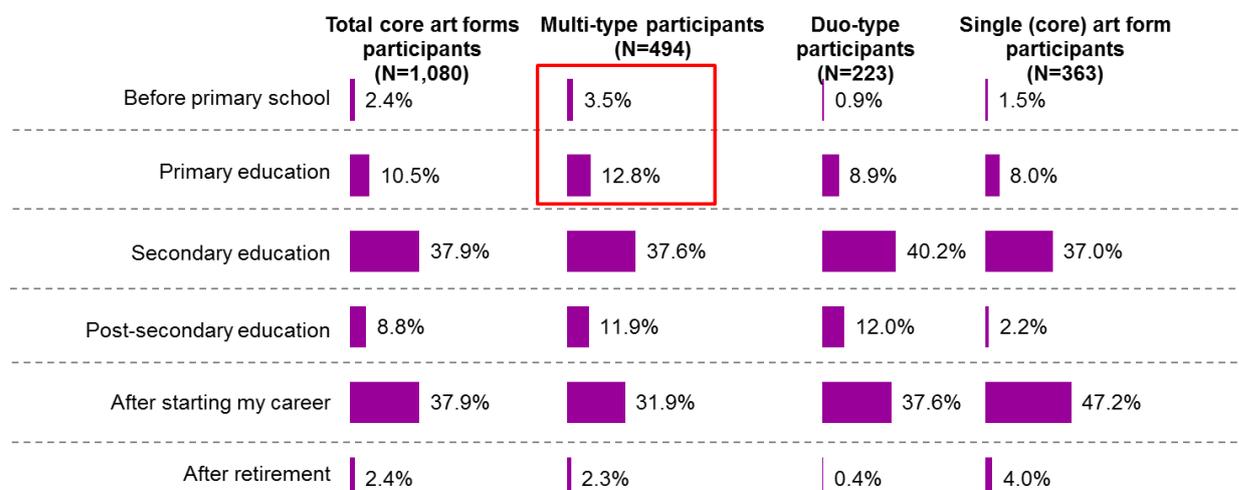


Base: All respondents (N=3,016)

Note: The figures might not add up to the totals due to rounding of decimal points.

E10. The start time of arts participation was a key factor that affected future behaviour in arts participation. Among the multi-type participants, 12.8% were exposed to arts as early as they attended primary school, and 3.5% started even before primary school. Such percentages were significantly higher than those of duo-type participants and single art form participants. In addition, secondary school is a key stage during which most participants started participating in arts activities. In other words, the earlier people had their first experience of arts, especially during school days, the more likely that they would become multi-type participants.

Exhibit 3. Start time of participating in arts activities by participants of core art forms



Base: All participants of any core art form who responded to the question (N=1,080)

II. Behaviour of Arts Participants

E11. On average, an arts participant participated in one of the ten art forms for 3.4 times in the past 12 months. Higher participation frequencies were found among Literary Arts participants (12.4 times), Film and Media Arts participants (2.3 times) and Multi-arts participants (2.3 times), while the lowest participation frequency was recorded among Pop Show participants (1.6 times).

Exhibit 4. Average number of times of participation per arts participant in the past 12 months by art forms

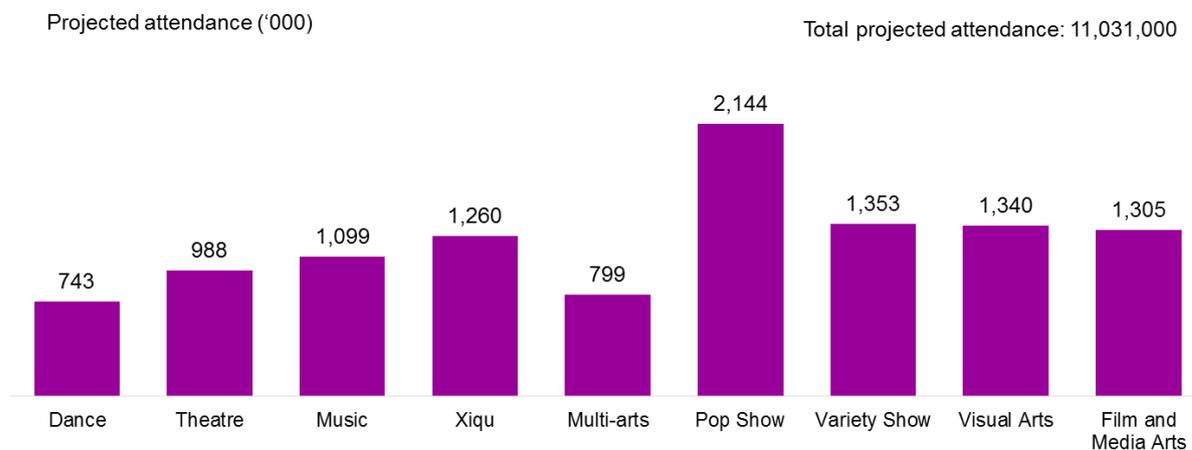
Art form	Number of times of participation per participant in past 12 months
<i>Overall</i>	3.4
Literary Arts	12.4
Film and Media Arts	2.3
Multi-arts	2.3
Xiqu	2.1
Variety Show	1.9
Dance	1.9
Music	1.8
Theatre	1.7
Visual Arts	1.7
Pop Show	1.6

Base: All participants of any art form who responded to the question (N=1,296)

E12. After applying the average frequency rate in Exhibit 4 to the projected participant population of each art form in Exhibit 1, the total attendance of the nine art forms (excluding Literary Arts) amounted to 11.0 million times in the past 12 months, while the total number of times of participation of Literary Arts was 18.3 million times in the past 12 months.

E13. Among the core art forms excluding Literary Arts, Visual Arts registered the largest number of attendances (1.34 million times), followed by Film and Media Arts (1.31 million times) and Xiqu (1.26 million times).

Exhibit 5. Projected number of attendances in the past 12 months of all art forms excluding Literary Arts



Base: All participants of any art form who responded to the question (N=1,296)

- E14. The total projected direct expenditures on arts participation in the past 12 months were about HK\$3 billion. The majority of the projected direct expenditures came from the purchase of tickets (around HK\$2 billion) and the remaining projected direct expenditures came from the purchase of books in Literary Arts (around HK\$1 billion).
- E15. Besides the economic values, arts activities brought intangible benefits to the arts participants. Respondents derived a range of benefits from arts participation, with entertainment/ relaxation being the most commonly perceived benefit across all art forms, particularly Pop Show (90.0%). Other specific benefits were received by participating in different art forms:
- Literary Arts – bringing intellectual benefits, especially improving self-learning (57.8%), and inner self benefits, especially bringing good temperament (35.1%) and enhancing self-cultivation/ inner quality (34.9%);
 - Music – bringing good temperament (41.5%);
 - Film and Media Arts – enhancing social bonding (28.2%), enhancing communications with others (27.4%), gaining self-reflection/ message (21.2%) and stimulating thoughts (16.7%);
 - Xiqu – enabling appreciation of cultures/ traditions (37.6%) and enhancing family bonding (24.8%); and
 - Visual Arts and Multi-arts – enabling self-learning/ broadening own horizons (44.1% and 38.4% respectively).



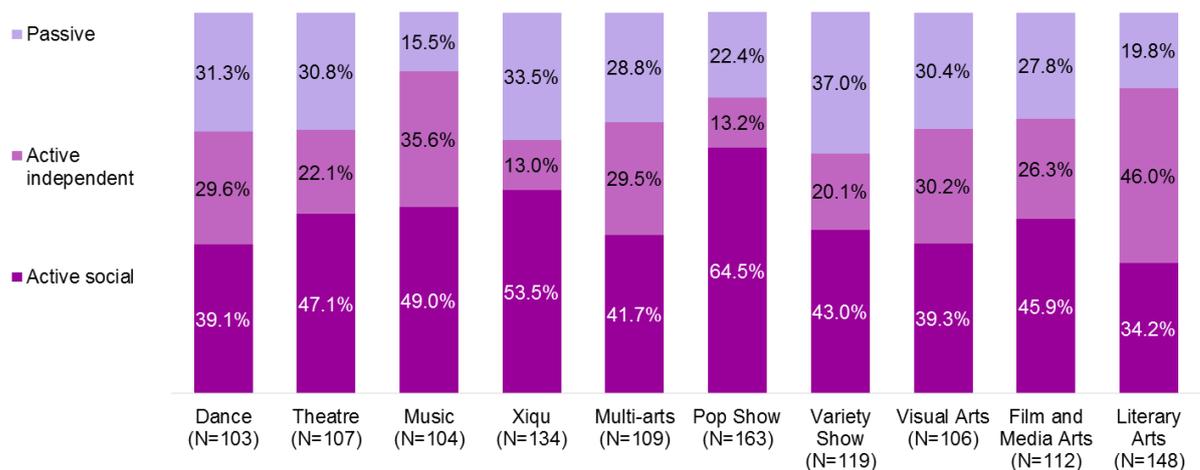
E16. When designing arts programmes/ promotion materials, the Government and/ or arts activity presenters can take into account the above benefits perceived by participants and consider highlighting these benefits to attract potential participants as current non-participants may not realise the benefits of participating in arts. Higher awareness of the benefits may induce interests in various art forms.

E17. From the Pre-Survey Focus Group Discussions, it was found that arts participants' attitudes (whether they were active or passive in attending arts activities) correlated with different motivators and drivers towards arts participation. The arts participants can be segmented into three types:

- Active social participants (from 34.2% for Literary Arts to 64.5% for Pop Show) – refer to those who would self-initiate to attend arts activities, and invite friends to attend arts activities or need company when going to arts activities;
- Active independent participants (from 13.0% for Xiqu to 46.0% for Literary Arts) – refer to those who would not actively invite friends to arts activities but would self-initiate to attend arts activities without company; and
- Passive participants (from 15.5% for Music to 37.0% for Variety Show) – refer to those who would only attend arts activities if they were invited by others.

In general, there were more active social participants than the other two types of participants in most art forms, except Literary Arts which registered the highest proportion of active independent participants (46.0%).

Exhibit 6. Segment of arts participants by attitudes



Base: All arts participants who gave valid responses to related attitude statements (N = 1,205)

E18. Active arts participants and passive arts participants cited different motivators or drivers for their participation in arts activities. Participants of some of the art forms

shared similar drivers of participation:

Motivators for active participation

- Visual Arts, Multi-arts and Music – genuine interest in the art forms (87%, 80% and 79% of respective participants);
- Pop Show and Visual Arts – famous artists/ shows/ exhibitions (50% and 47% of respective participants);
- Music, Dance and Multi-arts – music element of the shows (37%, 29% and 26% of respective participants); and
- Theatre – friends'/ family's recommendations (29% of participants), supporting friends/ family who performed (14% of participants).

Drivers for passive participation:

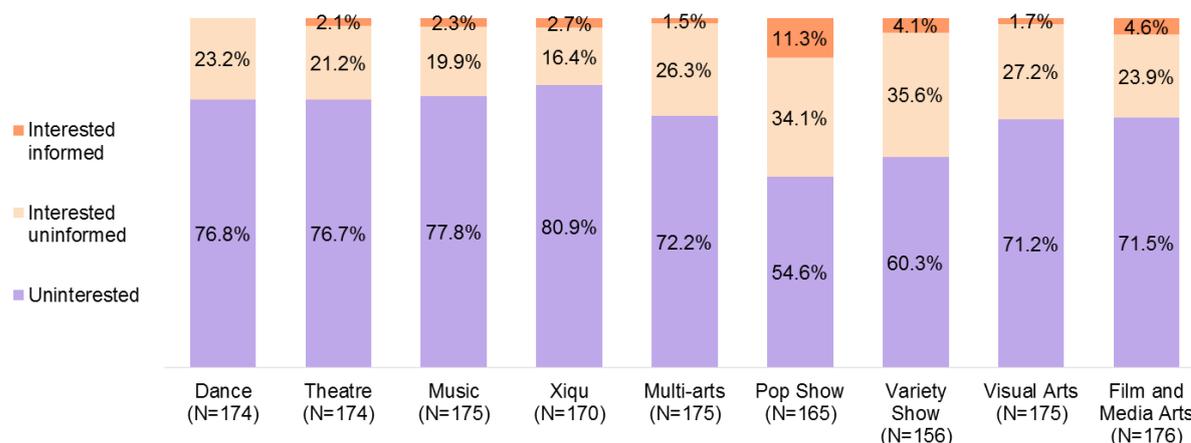
- Pop Show and Film and Media Arts – attending activities as couple/ social activities (66% of participants);
- Xiqu and Variety Show – attending as family activities (33% and 31% of respective participants);
- Variety Show and Music – supporting friends/ family who performed/ participated in the event (25% and 23% of respective participants); and
- Visual Arts – for learning purpose (32% of participants), either self-learning or school activity.

III. Overview of Arts Non-participants

E19. The arts non-participants can be segmented into three types:

- Interested informed non-participants (from 0% for Dance to 11.3% for Pop Show) – refer to those who were interested in an art form and were aware of the activities of the art form, but did not attend the activities due to various reasons such as busy schedule;
- Interested uninformed non-participants (from 16.4% for Xiqu to 34.1% for Pop Show) – refer to those who were interested in an art form but did not attend the activities because they were not aware of the arts activities of the art form; and
- Uninterested non-participants (from 54.6% for Pop Show to 80.9% for Xiqu) – refer to those who did not attend because they were not interested in the art form.

Exhibit 7. Segment of arts non-participants by attitudes



Base: All arts non-participants who gave valid responses to related attitude statements (N = 1,540)

E20. The main perceptual reasons for non-participation in arts activities are as follows:

- Multi-arts – not having enough knowledge to appreciate the art form (53.6% of non-participants);
- Pop Show, Film and Media Arts, Multi-arts, Visual Arts and Dance – the art forms were for young people (65.8%, 59.0%, 53.6%, 51.8% and 51.2% of respective non-participants);
- Literary Arts – the art form was solemn (46.7% of non-participants) and too abstract/ difficult to comprehend (41.6% of non-participants);
- Xiqu – the art form was for the elderly (66.0% of non-participants), difficult to get involved in (41.2% of non-participants), outdated and unable to reflect contemporary social cultures and values (based on the results of the Post-survey Deep-dive Focus Group Discussions); and
- Music – the art form was solemn (46.6% of non-participants) and for rich people (43.9% of non-participants).

E21.  The Government and/ or arts activity presenters could consider the following suggestions based on the analysis on the main barriers of participation to encourage non-participants to participate in arts activities:

- On converting the non-participants to become participants,
 - to target the interested uninformed non-participants as the priority for audience building as these people had already expressed interest in a particular art form. Promotion efforts can thus be more targeted and more

likely to be effective; and

- to explore how to leverage on active social participants to motivate passive participants or non-participants to engage in arts activities;
- On educating the non-participants, e.g. to change the negative perceptions of those non-participants who found the art forms too abstract/ difficult to comprehend (particularly for Literary Arts and Visual Arts (41.6% and 41.3% of respective non-participants)) through:
 - better design of the arts programmes, for example, the arts activity presenters in Visual Arts can arrange free guided tours at the exhibitions to introduce the art types and works; and
 - increasing the media coverage of the arts forms and arts programmes, giving recommendations and positive reviews of the arts programmes and highlighting the elements that are contrary to the negative perceptions.

IV. Pop Show/ Variety Show Only Segment

E22. As shown in Exhibit 2, 19.6% of arts participants or a projected population of 630,000 people did not participate in any core art form but only participated in Pop Show or Variety Show. The following were their characteristics:

- Slightly over half (52.2%) of them indicated that they had interest in participating in at least one core art form (e.g. Film and Media Arts (16.8%), Visual Arts (8.9%), Music (8.4%) and Theatre (7.1%));
- Compared with the composition of total arts participants, this segment consisted of more working singles (39.0%) and married persons having no children (8.7%);
- They had lower education attainment when compared to multi-type participants or duo-type participants. About one-quarter of them (25.6%) were tertiary (degree) educated, while the corresponding percentages for multi-type participants and duo-type participants were 34.6% and 31.9% respectively; and
- Slightly over half (53.7%) of them agreed that they would consider attending arts activities if they had the knowledge to appreciate them, and 48.7% of them agreed that they would consider attending arts activities if they had friends attending such activities.

E23. On the other hand, 29.2% of arts non-participants or a projected population of 779,000 people expressed that the art form they were most interested in was Pop Show/ Variety Show.

E24. In other words, there was a projected population of 1.4 million people who only participated in Pop Show/ Variety Show or were most interested in Pop Show/ Variety Show. This segment, with its large size and experience/ interest in stage performances, could be potentially converted to participants of core art forms.



E25. The Government and/ or arts activity presenters could consider the following suggestions based on detailed analyses of this segment, including the drivers for and attitudes towards arts participation and their lifestyles, to convert them into audience of core art forms:

- On driving participation,
 - to encourage friends' invitations (48.7% of this segment in the Questionnaire Survey mentioned that they tended to be motivated to participate in arts activities if they were accompanied by friends);
 - to distribute free tickets to encourage trial and participation (57.1% of this segment in the Questionnaire Survey mentioned that this was a possible driver for them); and
 - to promote arts activities of good reputation/ fame (46.9% of this segment in the Questionnaire Survey mentioned that this was a possible driver for them);
- On promotion of arts programmes,
 - to use channels that the working singles segment prefers or usually browses for information about arts programmes, mainly online platforms and especially social media; and
 - to design the promotion materials with brief descriptions about the arts programmes to arouse people's interest, and to ensure that the materials are easily comprehensible and attractive to people who have no knowledge/ experience on the arts programmes;
- On designing arts programmes,
 - to tailor-make the programmes (e.g. with simpler messages, shorter duration) for first-timers in order to give them good first experience of arts participation;
 - to provide productions of high quality or by arts companies that are well established, reputable and quality assuring to encourage repeated participation as this segment was attracted by the reputation/ fame of the

arts activities (46.9% of this segment in the Questionnaire Survey);

- to feature television or movie celebrities in the programmes as celebrities and entertainment are the common elements of Pop Show/ Variety Show (based on the results of the Questionnaire Survey that Film and Media Arts (16.8%) was the core art form that the largest proportion of people in this segment expressed interested in, likely because of the presence of the entertainment element);
- to schedule the start time of the programmes later in the day to fit the lifestyle of the working population (e.g. to start the shows on weekdays at 8:30 p.m./ 9:00 p.m.);
- On educating the general public about arts (based on the results of the Questionnaire Survey that they tended to be motivated to participate in arts activities if they had the knowledge to appreciate arts (53.7% of this segment)),
 - to provide supporting activities for the programmes, e.g. workshops, talks or exhibitions to arouse participants' interest and help them understand/ appreciate the art forms and arts programmes; and
 - to provide more background information, analyses and reviews of the art forms and arts programmes through media coverage to help the participants appreciate arts.

V. Segmentation of Respondents by Life Stages

E26. Respondents could be divided into five segments by life stages, viz. students, working singles, married persons having no children, married persons having children, and retirees, for more in-depth analyses. Age, education and marital status of respondents could influence their sets of values and perceptions towards arts, which might in turn lead to their different participation behaviour.

There were more students (arts participants: 16.8% vs. non-participants: 3.7%) and working singles (arts participants: 32.8% vs. non-participants: 22.0%) among arts participants. On the other hand, there were more married persons having children aged 15 or above (arts participants: 23.3% vs. non-participants: 38.2%) and retirees (arts participants: 6.6% vs. non-participants: 11.2%) among non-participants.

Exhibit 8. Profile of arts participants and non-participants by life stage segments

	Participants (N=1,599)	Non-participants (N=1,352)
Students	16.8%	3.7%
Working singles	32.8%	22.0%
Married persons having no children	6.4%	7.7%
Married persons having children aged 0-4	2.3%	2.7%
Married persons having children aged 5-14	11.8%	14.6%
Married persons having children aged 15+	23.3%	38.2%
Retirees*	6.6%	11.2%
Total	100.0%	100.0%

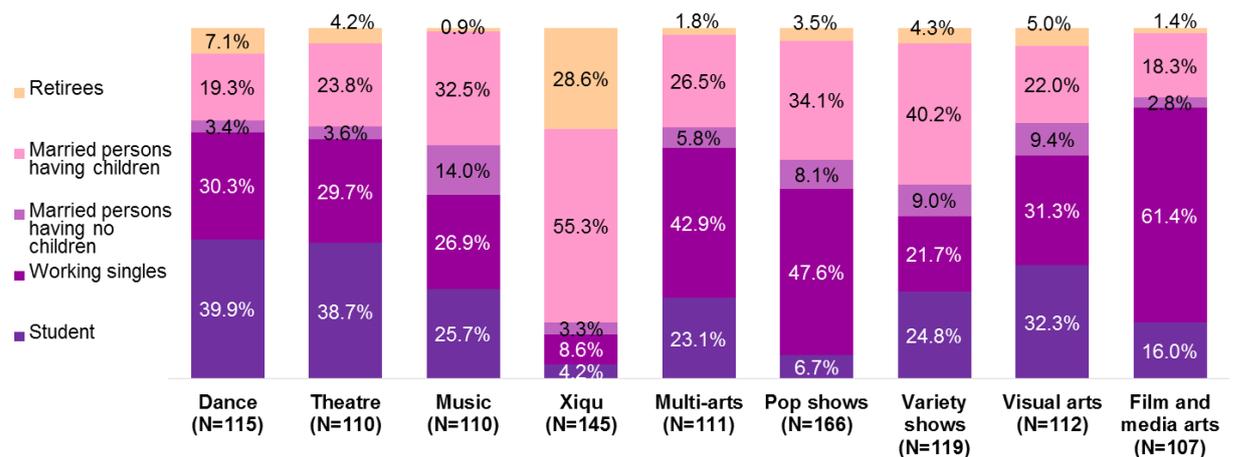
Base: All respondents who gave valid responses to related demographic questions

*Retirees are those who reported in the Questionnaire Survey that they had retired.

E27. The projected numbers of attendances in the past 12 months by life stages were different across the arts forms.

- Students contributed the highest shares of past 12-month attendance in Dance (39.9%), Theatre (38.7%) and Visual Arts (32.3%).
- Working singles contributed the highest shares of past 12-month attendance in Film and Media Arts (61.4%), Pop Show (47.6%) and Multi-arts (42.9%).
- Married persons having children contributed the highest shares of past 12-month attendance in Xiqu (55.3%), Variety Show (40.2%) and Music (32.5%).

Exhibit 9. Shares of past 12-month attendance by life stage segments across art forms



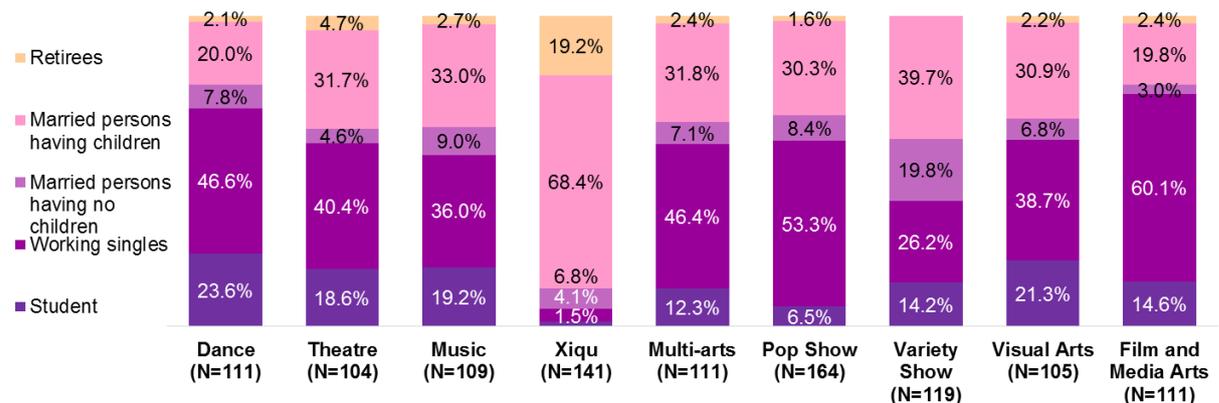
Base: All arts participants excluding those who answered “don’t know” in related questions (N = 1,095)

E28. Based on art forms, the sources of expenditures by different life stage segments are as below:

- Pop Show and Variety Show expenditures mainly came from working singles (53.3% and 26.2% respectively) and married persons having children (30.3% and 39.7% respectively).
- Across most core art forms, working singles again contributed the highest shares of spending (36.0% to 60.1%) except Xiqu (4.1%) of which the expenditures came mostly from the married persons having children (68.4%) and retirees (19.2%).
- Dance (23.6%), Visual Arts (21.3%), Music (19.2%) and Theatre (18.6%) had higher shares of expenditures contributed by students compared to other art forms.

Although students constituted large proportions in past 12-month attendance in Dance, Theatre and Visual Arts, their contribution to past 12-month direct expenditures was small due to lower ticket prices for students and free participations arranged by schools.

Exhibit 10. Shares of past 12-month ticket expenditures by life stage segments across art forms



Base: All arts participants excluding those who answered “don’t know” in related questions (N = 1,075)

Students

- E29. There were more students among multi-type participants (30.3%) than among single art form participants (10.5%) and duo-type participants (16.3%). It was likely because all senior secondary students were provided with more arts learning opportunities under the new education curriculum.
- E30. Students participated actively in arts because it was their hobby or they were fond of the art forms, particularly for Music (30.5%) and Literary Arts (34.2%). They participated passively in arts as the arts programmes were arranged by their schools, particularly for Film and Media Arts (27.8%) and Variety Show (28.2%).
- E31. Student participants tended to hold the attitude that school education had great influence on their arts participation (75.8% and 67.8% of Dance and Multi-arts participants respectively).
- E32. Among the student non-participants, 32.7% were interested in one of the core art forms. The art forms that they expressed the greatest interest in were Theatre (8.2%) and Dance (8.2%). Their main barriers for participating in arts activities were being busy with homework (67.3%) and lack of interest in arts (53.1%).

E33.  The Government and/ or the arts activity presenters could consider the following suggestions based on detailed analyses of student participants and non-participants, including the drivers for and attitudes towards arts participation and their lifestyles, to convert the students to become audiences of core art forms continuously in the future:

- On promotion of arts programmes,
 - to use channels that students prefer or usually use to browse information

about arts activities, i.e. online platforms such as social media;

- to use celebrity endorsement and to increase media coverage in the entertainment section and/ or movie section of various media in view that the younger segment tended to look for information about movies and entertainment (51.0% and 42.9% of the student non-participants respectively in the Questionnaire Survey); and
- On providing early arts experiences to the young segment, i.e. to promote/ enhance arts education in schools, through:
 - supporting regular or thematic arts activities at school (e.g. drama week/ Day, Cantonese Opera week/ day) to raise students' awareness of and interest in arts participation;
 - encouraging education on arts history and arts appreciation to give young people exposure and basic knowledge to appreciate various arts forms and activities in view that students did not participate in arts mainly because they were busy with homework/ examinations (67.3% of the student non-participants in the Questionnaire Survey);
 - providing training to arts teachers to improve the quality of arts education in view that teachers' ways of introducing arts activities and guiding students to appreciate arts activities had considerable impact on students' arts participation. For example, training courses can be arranged for arts teachers on how to transfer their arts knowledge to students and how to arouse students' interest in the art forms through participation in the activities. Government sponsorships and grant schemes can likely encourage participation in such training; and
 - supporting renowned artists to give introductions on arts forms/ activities and to carry out introductory performances to provide impressive first experiences of arts to youngsters as good first experiences can induce repeat participation.

Working Singles and Married Persons having No Children

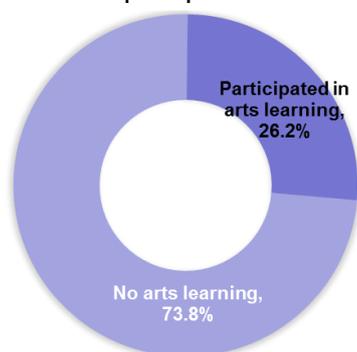
E34. As mentioned in para. E22, there were more working singles and married persons having no children in the Pop Show/ Variety Show only segment when compared with the composition of total arts participants. Findings and suggestions on audience building for these segments can be found in Section IV: "Potential Arts Audience – Pop Show/ Variety Show Only Segment".

Married Persons Having Children

E35. In view that the children aged 16-19 are still in secondary schools and many are undertaking arts learning with the support from parents, the Study specifically targeted the married persons having children aged 19 or below for the following topic of arts learning. Among the total 3,016 respondents, 682 persons had children aged under 20. Slightly over one-quarter (26.2%) of them arranged their children to learn at least one art form, mainly Music (62.9%) and Dance (33.6%). On average, they spent HK\$14,130 on their children's arts learning activities annually.

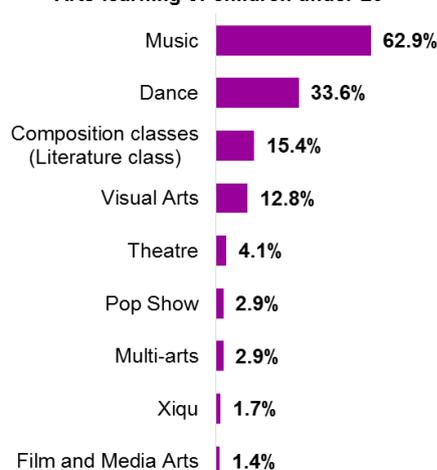
Exhibit 11. Participation in arts learning among children

Percentage of the married persons with children under 20 who arranged their children to participate in arts learning



Q: D4
Base: All married persons having children under 20 (N=682).

Arts learning of children under 20



Average annual expenditure on children's arts learning per married person having children under 20 **HK\$14,130**

Base: All married persons having children under 20, who arranged them to learn arts activities (N=179).

E36. The major motivators for parents to arrange their children to participate in arts were the elements of the arts programmes (e.g. interests of children), particularly for Theatre (48.5%) and Multi-arts (39.4%), and the development of children, particularly for Literary Arts (31.1%). The main reason for passive arts participation was treating the activities as family activities, particularly for Variety Show (34.7%) and Film and Media Arts (50.0%).

This segment was more likely to find the entertainment/ relaxation gained, particularly for Pop Show (93.7%) and Xiqu (73.0%), and the enhancing of family bonding (Music, 36.2%; Literary Arts, 27.1%; Dance, 23.7%), as benefits of participating in arts programmes.

The married persons with children participants tended to think that they were exposed to more art forms after they had children. They also considered themselves willing to spend money on participating in arts activities (especially Theatre (67%)).

E37. Among the married persons having children and who were non-participants, their interest in art forms varied with the age range of their children. Those with children aged 15 or above were more interested in Xiqu (17.6%), while those who had children aged 0-4 years old were more interested in Dance (8.2%).

Exhibit 12. Art forms that were most interested in among married persons having children and who were non-participants

	Married persons having children aged 0-4 (N=32)	Married persons having children aged 5-14 (N=194)	Married persons having children aged 15+ (N=524)
Pop Show & Variety Show	41.4%	39.4%	19.3%
Pop Show	35.1%	25.6%	12.1%
Variety Show	6.3%	13.8%	7.2%
Core art forms	32.2%	19.2%	28.3%
Xiqu	9.8%	2.2%	17.6%
Film and Media Arts	6.4%	5.6%	3.1%
Theatre	3.7%	4.5%	3.6%
Dance	8.2%	2.7%	1.9%
Music	0%	1.4%	0.8%
Visual Arts	2.7%	2.2%	0.7%
Literary Arts	0%	0.5%	0.3%
Multi-arts	1%	0%	3%
None of the above	26.4%	41.4%	52.3%

Base: Married persons having children and who were non-participants (N = 750)

E38.  The Government and/ or the arts activity presenters could consider the following suggestions based on detailed analyses of the results of the Questionnaire Survey and the Post-survey Deep-dive Focus Group Discussions, in order to attract more married persons having children non-participants to participate in arts programmes:

- On promoting arts programmes,
 - to use channels which are preferred and usually used by the married persons having children to disseminate information about arts programmes, including online platforms (e.g. social media), public transport and websites/ magazines about food and beverage and entertainment; and
- On designing arts programmes,
 - to organise workshops for relevant art forms (e.g. music concerts and drama performances) with the purpose to educate/ provide more information and knowledge to the children about the particular art forms and programmes,

in view that the married persons having children were motivated by development of their children and family bonding.

Mature Segment (Married Persons Having Children Aged 15 or above and Retirees)

E39. The mature segment dominated the Xiqu participants and the non-participants who were most interested in Xiqu.

As shown in Exhibit 2, a projected population of 996,000 participated in only one core art form. This group of people had a higher incidence of participating in Literary Arts (39.0%, a projected population of 388,000 people) and Xiqu (31.0%, a projected population of 309,000 people).

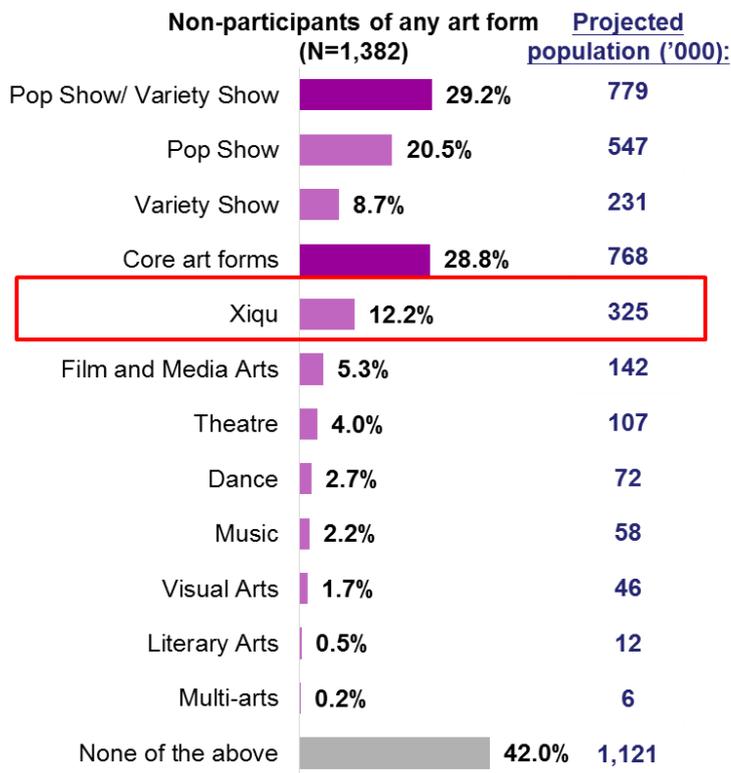
Exhibit 13. Art forms that single art form participants participated in

Art form	Percentage
Literary Arts	39%
Xiqu	31%
Visual Arts	9%
Music	7%
Film and Media Arts	5%
Dance	3%
Theatre	3%
Multi-arts	1%

Base: All single art form participants (N=517)

At the same time, the core art form that the non-participants expressed the greatest interest in was Xiqu (a projected population of 325,000 people).

Exhibit 14. Art forms that non-participants were most interested in



Base: Arts non-participants (N=1 382)

E40. The characteristics of the mature segment are as follows:

- Married persons having children aged 15 or above and retirees respectively constituted 48.9% and 19.2% of the Xiqu participants, as well as 55% and 36% of the non-participants who were most interested in Xiqu.
- There were more single art form participants in the mature segment. They tended to consider that the other arts activities were something solemn (45.6%) and for young people only (45.0%).
- Among the non-participants in this segment, those having children aged 15 or above had the lowest interest in arts (80.3% mentioned “not interested” as their reason for not participating); 15.7% opined that they did not have enough knowledge to appreciate arts (higher than other segments). Some of the retirees mentioned lack of companion as a barrier (19.3%); some considered that arts activities were for young people (particularly for Dance (79.3%) and Film and Media Arts (75.4%)), and too abstract and too difficult to comprehend (particularly for Dance (65.5%) and Film and Media Arts (53.9%)).

E41.  The Government and/ or the arts activity presenters could consider the following suggestions based on detailed analyses of the mature segment, including the drivers for and attitudes towards arts participation and their lifestyles, to improve arts participation among this segment:

- On driving participation in arts activities,
 - to distribute free tickets (43.3% of the retiree non-participants mentioned as a possible driver in the Questionnaire Survey) to the mature segment so that they can try out the new art form. Nevertheless, it is important that those performances are of good quality in order to change their negative perceptions on arts;
 - to organise arts activities in venues that are close to residential areas (especially areas where the older population lives in) (30% of the retiree non-participants mentioned this as a possible driver in the Questionnaire Survey) in view that the mature segment may have lower mobility;
 - ✧ in particular, 21%, 19.7% and 18% of the non-participants in Sha Tin, Kowloon City and Yuen Long respectively indicated that they were most interested in Xiqu. Such percentages were higher than those in other districts. Hence higher priority can be given to these districts on reaching the potential mature participants; and
 - to solicit friends' invitations as this segment will be motivated to participate in arts activities with friends' invitations;
- On promoting arts programmes,
 - to promote arts programmes by using channels that the mature segment usually browses for information or prefers to receive information, i.e. television/ radio, outdoor advertisements and indoor advertisements (arts venues, ticketing offices, public libraries, community centres);
 - to cross-promote arts programmes by inserting leaflets in the house programmes of activities that the mature segment commonly attends;
 - ✧ in particular, Tuen Mun and Sai Kung districts had the highest percentages of participants who only participated in Xiqu (15% respectively). Higher priority can be given to these districts on the cross-promotion of different art forms' programmes; and
- On educating the mature segment about arts in general,

- to sponsor television or radio programmes on introducing different art forms; and
- to promote audience etiquette during attendance of performances.

Limitations of Study

E42. Readers are cautioned on the following limitations of the Study:

About the methodology

- Street intercept interview method was adopted to meet the research objectives and survey schedule. The Study followed the usual practice to apply age and gender interlocking quotas and living districts quotas to reflect the characteristics of the Hong Kong population as a whole.
- However, the overall survey sample was skewed towards clerical supports workers, service workers and sales workers. There was also a lower proportion of associate professionals and non-technical labour/ elementary occupations when compared to the figures of the Census and Statistics Department. Further interlocking weighting on gender and age by occupation was applied during the data management stage to reduce the discrepancy and increase the representativeness of the sample.

About the participation behaviour

- To avoid respondent fatigue and a high drop-out rate, each respondent only answered the total number of times of participation (or participation frequency), and average amount spent on an art form in the past 12 months instead of answering the details of each participation. Hence, the proportion of free and paid participation among the projected annual attendance is not known.
- The average expenditures on different items (e.g. tickets, transportation, food and dining, souvenirs) were self-claimed and provided in a range by each respondent. It might cause a loss of the sensitivity of the data.