



NATIONAL ARTS COUNCIL  
SINGAPORE

# INTERNATIONAL PERCEPTION OF THE ARTS

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Audience familiarity and engagement  
with Singapore arts

Comparative findings from 9 markets  
A compendium to NAC IPS 2021 Infographics

A REPORT BY KANTAR PUBLIC SINGAPORE



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# INTERNATIONAL PERCEPTION OF THE ARTS 2021

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## OBJECTIVES

*How can we elevate and grow Singapore's art scene globally, through international collaboration and audience engagement?*

To inform its 2018 – 2022 Arts Plan, NAC commissioned a study to assess international perceptions of Singapore arts and culture.

The International Perception of Singapore Arts study (IPS), conducted in 2016<sup>1</sup>, aimed to provide insights on what makes Singapore arts and culture distinctive. To prepare for the next 5-year Arts Plan<sup>2</sup> (2023 – 2027), NAC has commissioned a study to update its understanding of international audiences' familiarity and engagement with Singapore arts and culture.

This second iteration of the IPS continues to explore what is needed to “take Singapore's arts beyond its shores”.

This second iteration of the IPS continues to explore what is needed to “take Singapore's arts beyond its shores” – with an expanded focus on 9 priority markets: Thailand, Beijing, Hong Kong, Jakarta, Kuala Lumpur, London, Melbourne, Paris, and Seoul.

On top of in-depth-interviews with 40 experts, the study also includes an online survey of 9000 audiences in these 9 markets, with an emphasis on uncovering the drivers and barriers to arts familiarity, engagement, and consumption.

This report broadly outlines findings from our survey.

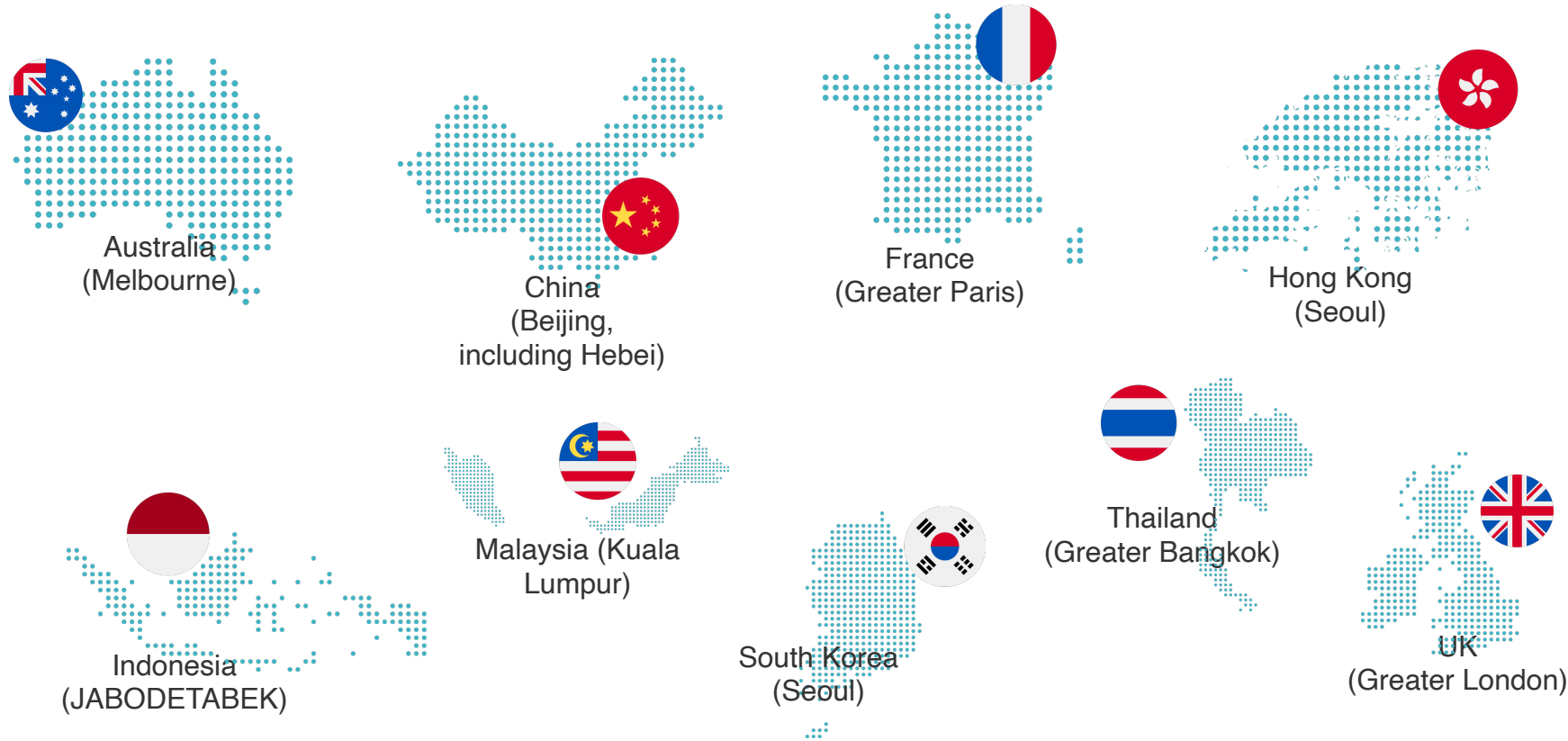
While we uncovered some nuanced changes in audience perceptions and engagement patterns from IPS 2016, certainly the past 2 years of the Covid-19 pandemic has been an anomalous period for arts audiences worldwide.

Not only has Covid-19 impacted international travel, engagement and consumption patterns have inadvertently changed due to restrictions on social gatherings and arts attendance in physical venues.

As markets open borders to international travel again, and as we find surer footing living with an endemic, NAC's international relations strategy will come to the fore.

We hope our study will be helpful for NAC as it crafts its vision to build a creative economy for the next 5 years – to strengthen the arts sector, promote market access for artists and the arts sector, and to shape the role of the arts to support the broader foreign policy agenda.





# TO ASSESS INTERNATIONAL MARKET DEVELOPMENT

From September to October 2021, we administered an online survey with arts audiences residing across 9 markets of priority to NAC.

We assessed audiences' engagement with the arts in general, and with SG arts in particular.

Our survey covered:

- General arts engagement
- Engagement with and impressions of SG
- Awareness and perceptions of SG arts
- Engagement with SG arts within / outside of SG
- Likelihood to consume SG arts in the next 12 months
- Drivers to future consumption of SG arts

## 9 markets

of which, 5 markets are newly surveyed in this study. Beijing, Jakarta, London, are Melbourne were surveyed in IPS 2016 and 2021

## N = 9000

1000 respondents from each market

## 20 min

Length of interview with a total of 47 questions

## Past 3 years

Has engaged / consumed arts

## Age, Gender

Close to representative. Sampling for other demographic markers is not representative<sup>3</sup>.

# VIBRANT CITIES FOR ARTS AND CULTURE





# THE TOP 5 MOST VIBRANT CITIES FOR ARTS AND CULTURE

**Singapore features in the top five most vibrant cities for arts & culture for four markets, but similar to IPS 2016, the powerhouses are still in the West.**

As in the 2016 Perceptions study, Paris, London and New York are mentioned most often across all markets. Paris features in the top 5 most vibrant cities for audiences in the 9 markets we surveyed.

Unsurprisingly, most audiences list their own cities in the top 5 most vibrant, likely due to familiarity and a sense of pride. Singapore ranks in the top 5 most vibrant cities for 4 key markets – China, Indonesia, Thailand, and UK.

Notably, Chinese, Indonesian, and Thai audiences are also most familiar with SG arts – suggesting that UK audiences view Singapore as a vibrant city beyond its arts and culture<sup>4</sup>.

Out of the 9 markets surveyed, Tokyo emerges as the leading Asian city for arts & culture, appearing consistently as one of the top 5 most vibrant cities for audiences in 6 key markets.

Aggregating results<sup>5</sup> across all 9 markets, Singapore ranks 5<sup>th</sup> in the top 5 most vibrant cities.

Aggregated top 5 most vibrant cities ranked by audiences in IPS 2021



1<sup>st</sup>  
PARIS



2<sup>nd</sup>  
NEW YORK



3<sup>rd</sup>  
LONDON



4<sup>th</sup>  
TOKYO



5<sup>th</sup>  
SINGAPORE

Top 5 most vibrant cities ranked by audiences in IPS 2016<sup>6</sup>



1<sup>st</sup>  
LONDON



2<sup>nd</sup>  
PARIS



3<sup>rd</sup>  
NEW YORK



4<sup>th</sup>  
TOKYO



5<sup>th</sup>  
SINGAPORE

# FAMILIARITY WITH SINGAPORE ARTS





# FAMILIARITY WITH SG ARTS

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Of the markets surveyed, Southeast Asian markets are relatively more familiar with SG arts than their western counterparts, with Indonesian audiences most familiar with SG arts leading the pack. East Asian markets (i.e. Hong Kong and South Korea) ranked lowest in levels of familiarity.



# FAMILIARITY WITH SG ARTS

**Audiences in Southeast Asia and China are relatively more familiar with SG arts than audiences in other East Asian markets and in the West.**

Out of all audiences in the 9 key markets, Indonesians, followed by Thai, Chinese and Malaysian audiences are most familiar with Singapore arts.

South Korea and Hong Kong are outliers in their level of familiarity with SG arts, ranking even lower than audiences in the West.

## Spontaneous mentions

Interestingly, spontaneous mentions of SG artists / artworks / arts organisations seem to be inconsistent with audiences' self-reported familiarity in some markets.

Chinese audiences, for example, were able to spontaneously mention significantly lesser (total 28) artists / artworks / arts organisations compared to South Koreans (total 155), despite feeling significantly more familiar with SG arts.

Perhaps the most consistent audience in self-reported feelings of familiarity, Indonesians were able to name >700 SG artists / artworks / organisations – mostly in the fields of music, visual arts, and theatre.

Former Singapore Idol musician Sezairi Sezali was one of the names out of the >700 artists / artworks / organisations mentioned by Indonesian audiences, Sezairi's music video has garnered > 26 million views on YouTube by audiences around the world. The young musician has also appeared in Indonesian music publications and tabloids.

## In markets with high familiarity



*More than*

**50%**

of audiences in each these four markets are familiar with SG arts and culture

*Only up to*

**4%**

of audiences are not at all familiar with SG arts and culture

## In markets with low familiarity



*Up to*

**27%**

of audiences in the remaining five markets are familiar with SG arts and culture

*Between*

**20-24%**

of audiences are not at all familiar with SG arts and culture. At 52%, Australian audiences rank the most unfamiliar with SG arts



## MARKET WITH HIGHEST UNFAMILIARITY



**27%**

of Australian audiences feel familiar with SG arts & culture

**52%**

of Australian audiences are not at all familiar with SG arts & culture

Despite having a familiarity rate that is consistently low with East Asian and Western markets, an unusually large proportion of Australian audiences self-reported to be highly unfamiliar with SG arts

## MARKETS WITH SPONTANEOUS MENTIONS

### MOST FAMILIAR, AND MOST MENTIONS



Indonesian audiences not only self-reported most familiar with SG arts, they were also able to name the most artists / artworks / organisations

**68%**

Of Indonesian audiences feel familiar with SG arts

**700**

Artists / artworks / organisations spontaneously mentioned

### FAMILIAR YET NOT, UNEXPECTED MENTIONS



In contrast, South Korean audiences were able to name more artists / artworks / organisations than Chinese audiences, despite having self-reported lower familiarity

**20%**

of South Korean audiences feel familiar with SG arts

**155**

Artists / artworks / organisations spontaneously mentioned



**50%**

of Chinese audiences feel familiar with SG arts

**28**

Artists / artworks / organisations spontaneously mentioned

## Spontaneous mentions – Arts and cultural sites

Large institutional museums seem to be the most well-known arts and cultural sites for audiences in all markets. These include: ArtScience Museum National Gallery, National Museum of Singapore, Singapore Art Museum, and Red Dot Museum.

Other audiences (e.g. Hong Kong, France, UK) named theatres and performing arts centres (e.g. Victoria Theatre, Esplanade).

French audiences stood out compared to audiences from other markets in their mentions of smaller, independent art spaces (e.g. Gillman Barracks, The Projector), while Thai audiences were notable in their mentions of art galleries and street murals.

Aside from arts and cultural sites, tourist spots such as Clarke Quay, Orchard Road, Gardens By The Bay, Botanical Gardens, were also mentioned.

## Spontaneous mentions – Artworks, artists, organisations

Artists named by audiences from all markets are almost mainly musicians and theatre practitioners, with the occasional mention of commercial film actors<sup>7</sup>.

These include – Dick Lee, Fann Wong, Gentle Bones, Georgette Chen, Inch Chua, JJ Lin, Kuo Pao Kun, Nathan Hartono, Ong Keng Sen, Sam Willows, Singapore Symphony Orchestra, Stefanie Sun, Zubir Said – some of whom were also mentioned in IPS 2016.

Thai audiences stood out in their mention of Jahan Loh (street / graffiti artist), and Robert Yeo (writer).

Meanwhile French audiences, seem to mention more events, festivals, and performing arts shows (e.g SIFF), rather than artists / artworks / organisations.

South Korean audiences also mentioned a disproportionate number of art schools and institutes of higher learning compared to audiences from other markets.

# IMPRESSION S OF SINGAPORE ARTS





# IMPRESSIONS OF SG AND SG ARTS

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The markets with the most positive impressions of SG arts are China, Indonesia and Thailand. On the other hand, South Korea, Hong Kong and France have the lowest proportion of audiences who believe SG arts to be 'very good' or 'good'.





# IMPRESSIONS OF SG AND SG ARTS

Visitors to Singapore are more likely to have some kind of impression of Singapore. Those with more positive impression are in turn more likely to consume SG arts in the future.

Singapore is well-known as a travel destination and global hub. Perhaps not by coincidence, markets which ranked Singapore as one of the top 5 most vibrant cities, are also amongst Singapore’s top 15 source markets for tourism<sup>8</sup>.

China for example, ranked #1 in Singapore’s top international visitor arrivals (IVA) in 2019, and is also is largest tourism receipt (TR) generating market.

Indonesia comes in a close #2, and Malaysia #4 in Singapore’s top IVA and TR generating market (STB, 2019).

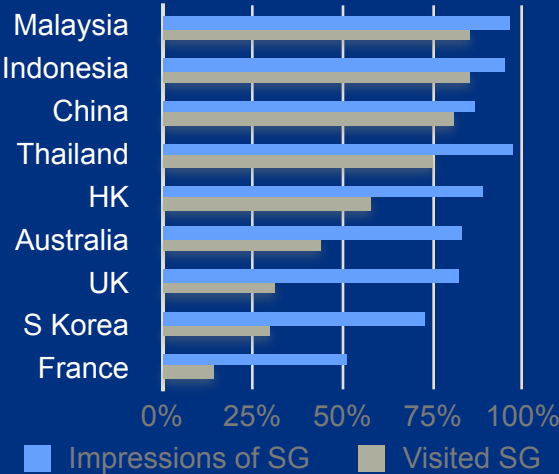
Across and within markets, audiences who have visited Singapore are more likely to have an impression of Singapore; and in turn, more likely to consume SG arts in the future.

### Impressions of Singapore arts

Overall, Chinese, Indonesian, and Thai audiences had the best impression of SG arts.

Thai audiences led, with the highest proportion of audiences with positive impressions of SG arts quality (72%).

## IMPRESSIONS OF SG AND VISITORSHIP



|           | Ranking by<br>International<br>Visitors Arrival (IVA) | Ranking by<br>Tourism Receipt |
|-----------|-------------------------------------------------------|-------------------------------|
| China     | 1                                                     | 1                             |
| Indonesia | 2                                                     | 2                             |
| Malaysia  | 4                                                     | 8                             |
| Australia | 5                                                     | 4                             |
| UK        | 10                                                    | -                             |
| Thailand  | 1<br>2                                                | -                             |

Source: STB Quarterly Tourism Performance (2019)



Unsurprisingly, those who believe Singapore Arts to be good, are more likely to consume. Conversely those who believe Singapore arts to be poor, are less likely to consume.

|                                                                                     |                   |  GOOD |  FAIR |  POOR |
|-------------------------------------------------------------------------------------|-------------------|----------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
|    | IMPRESSIONS       | 70%                                                                                    | 26%                                                                                    | 4%                                                                                       |
|                                                                                     | LIKELY TO CONSUME | 93%                                                                                    | 80%                                                                                    | 46%                                                                                      |
|    | IMPRESSIONS       | 72%                                                                                    | 19%                                                                                    | 10%                                                                                      |
|                                                                                     | LIKELY TO CONSUME | 78%                                                                                    | 15%                                                                                    | 7%                                                                                       |
|    | IMPRESSIONS       | 57%                                                                                    | 35%                                                                                    | 8%                                                                                       |
|                                                                                     | LIKELY TO CONSUME | 97%                                                                                    | 76%                                                                                    | 74%                                                                                      |
|   | IMPRESSIONS       | 52%                                                                                    | 36%                                                                                    | 12%                                                                                      |
|                                                                                     | LIKELY TO CONSUME | 89%                                                                                    | 63%                                                                                    | 52%                                                                                      |
|  | IMPRESSIONS       | 47%                                                                                    | 38%                                                                                    | 15%                                                                                      |
|                                                                                     | LIKELY TO CONSUME | 79%                                                                                    | 53%                                                                                    | 41%                                                                                      |

Thai audiences also had the highest likelihood (78%) to consume SG arts in the next 12 months. Chinese audiences came in a close second with the high proportion of impression of SG arts quality (70%), and an astonishing likelihood to consume SG arts in the next 12 months.

South Korea (36%) and France had the lowest proportion of respondents who believed SG arts is “very good” or “good”. Yet, a high proportion (79%) of French audiences were likely to consume SG arts.

#### Poor(er) impressions of quality – but still likely to consume SG arts

Of the relatively high proportion of South Korean audiences (14%) who have a poor(er) impression of SG arts, only a small percentage (3%) of Korean audiences are likely to consume SG arts in the next 12 months.

This suggests some level of consistent inertia for South Korea – a market of audiences with low familiarity of SG arts, and a minority with good impressions of SG arts.

However, what’s notable are audiences from Indonesia (8%) and Malaysia (12%) with poor(er) impressions SG arts. Both expressed unusually high likelihood of consuming SG arts in the next 12 months (Indonesia: 74%, Malaysia: 52%) despite having poor(er) impressions<sup>1</sup>.

While the data is inconclusive as to reasons why, we can gather that Indonesian and Malaysian audiences are still very likely to consume SG arts in the next 12 months despite having low impressions of the quality.

This suggests that for some markets, impressions of good / poor(er) quality is just one of the many factors which influences audiences’ likelihood to consume SG arts.

*Beyond having the highest proportion of audiences with positive impressions of SG arts & culture, these three markets (with the exception of UK) – China, Indonesia, Thailand – are also the markets which named Singapore as one of the top 5 most vibrant cities.*

# CONSUMPTION OF SINGAPORE ARTS





# PURCHASE OF SG ARTS

Chinese and UK audiences are most likely to have purchased art created by/ tickets to events featuring SG artists, whereas audiences in South Korea are least likely to have done so. Overall, the most common artworks by SG artists which have been purchased by international audiences are music, visual arts and theatre.

Southeast Asian and Chinese audiences reported highest levels of satisfaction.



# PURCHASE OF SG ARTS

Low purchase levels, poor(er) impression and low familiarity

South Korea, Hong Kong, and Australia rank amongst the lowest in their purchase of SG arts.

Not only do South Korean audiences noticeably trail behind in its consumption of SG arts (18%) across 9 markets – they are also far behind to its next low purchasing neighbour, Australia(55%).

High purchase levels – good impression, high familiarity, and more

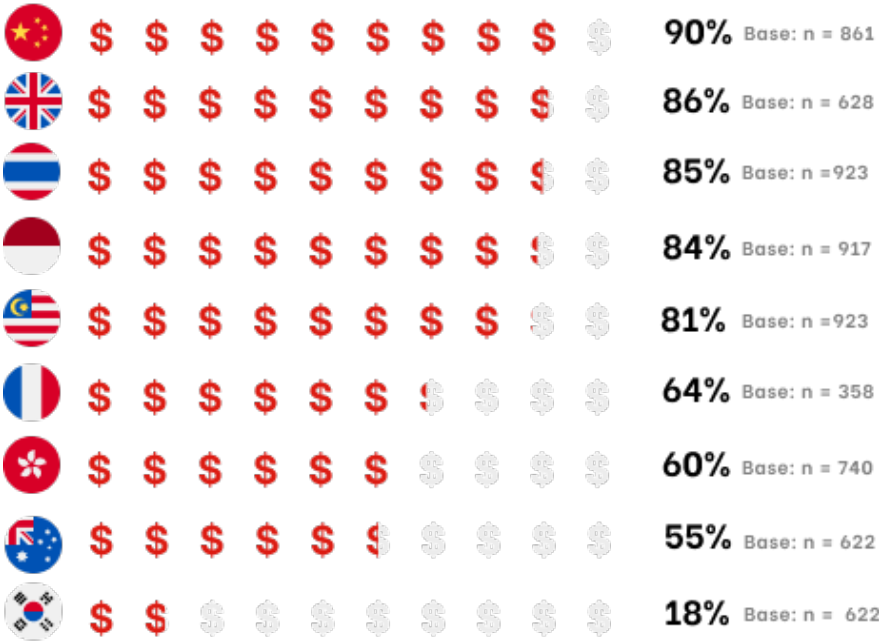
To no surprise, Chinese and Thai audiences not only boast the highest proportion of those with good impressions of SG arts, they are also amongst the top 5 markets with high purchase of SG arts.

If impression and familiarity drives consumption, then how might we explain the large proportion of Indonesian (84%) and Malaysian audiences (81%) who have purchased SG arts?

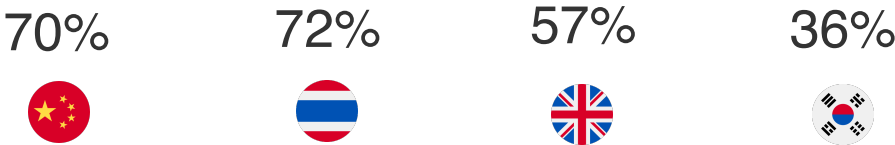
Few Malaysian and Indonesian audiences seem to have good impressions of SG arts.

Across the 9 key markets, we found that audiences who have positive impressions of the quality of SG arts are more likely to consume SG arts in the next 12 months

% who purchased Singapore arts



% with positive impressions of quality of SG arts





|                                                                                     | 1 <sup>st</sup> most consumed art form | 2 <sup>nd</sup> most consumed art form | 3 <sup>rd</sup> most consumed art form |
|-------------------------------------------------------------------------------------|----------------------------------------|----------------------------------------|----------------------------------------|
|    | MUSIC                                  | COMMERICAL FILMS                       | THEATRE                                |
|    | MUSIC                                  | THEATRE                                | COMMERCIAL FILMS                       |
|    | MUSIC                                  | COMMERCIAL FILMS                       | COMMUNITY ARTS                         |
|    | MUSIC                                  | THEATRE                                | COMMERCIAL FILMS                       |
|    | MUSIC                                  | COMMERCIAL FILMS                       | VISUAL ARTS                            |
|    | MUSIC                                  | COMMERCIAL FILMS                       | DANCE                                  |
|   | MUSIC                                  | THEATRE                                | DANCE                                  |
|  | MUSIC                                  | THEATRE                                | COMMUNITY ARTS                         |
|  | COMMERCIAL FILMS                       | MUSIC                                  | THEATRE                                |

\*\*Highlighted art forms are also the SG art form consumed most by that market

However, as we've seen in previous sections, having poor(er) impressions of SG arts does not seem to have put a dent on Indonesian and Malaysian audiences' likelihood to consume.

Considering the low familiarity (32%) and low proportion of UK audiences with good impression (57%) of SG arts, one would almost expect UK audiences to have low purchase of SG arts.

However, at 86% of purchase of SG arts, UK audiences buck the trend – suggesting there might be other reasons for UK audiences' consumption.

In this regard, perhaps visitorship numbers offer a clue. China, Indonesia, Malaysia, Thailand, and UK all rank amongst the top 15 markets in international visitors arrival (IVA) and tourism receipt (TR) -- suggesting a strong case for for visitorship being an influence in consumption patterns of SG arts to audiences in these markets.

**Most purchased art forms**

The most purchased art forms across all audiences are music, theatre, and visual arts.

French audiences stood out in their purchase of SG literary works; while Indonesian audiences were distinct in their consumption of SG dance.

Comparing top 3 SG art forms consumed, with art forms generally consumed by audiences from all 9 markets:

- music
- theatre
- commercial films,

one would notice that the SG visual arts stands out.

Almost all audiences from 9 markets purchase / consume SG visual arts. Yet only Indonesian audiences cite visual arts as one of the top 3 art forms they are interested in. Where does this interest for SG visual arts come from? Could audiences' consumption of visual arts be highly contextualised to SG visual arts only? And what does this mean for other SG art forms and audiences beyond visual arts and Indonesia?

If anything, Hong Kong and Thai audiences' general interest in community arts events – suggests that other types art forms/ events could be introduced to attract international audiences to consume SG arts.

CONSUMPTION OF SG ARTS

Satisfaction of purchase – three enamoured audiences

All markets report high levels of satisfaction, with the exception of France and South Korea (both 66%).

Thai audiences rank the most satisfied, with 94% of audiences being satisfied with their purchase of SG arts. Indonesian (93%) and Chinese audiences (90%) came in closely with their purchase satisfaction of SG arts

Overall, Thailand, Indonesia, and China remain the three most engaged audiences by vibrant cities ranking, familiarity, impression, consumption, and satisfaction.

Low satisfaction due to market or art forms?

Notably, music, theatre, and visual arts are top 3 art forms consumed by Chinese, Thai, and audiences in some other markets.

Is there something particular about these art forms which yields such overwhelmingly positive satisfaction?

We can look at South Korea and UK audiences for comparison. Both too, had the same top 3 SG art forms consumed. UK audiences report high rates of satisfaction (88%), while just two-thirds of South Korean audiences (66%) find their purchase of SG arts satisfactory. French audiences are on par with their South Korean counterparts in relatively low levels of satisfaction (66%).

It's inconclusive if audiences experience low satisfaction because of the quality of art forms purchased. However, looking at findings from IPS 2016, South Korean and French audiences have changed little in their outlook of SG arts. These two markets remain highly unlikely audiences for SG arts.

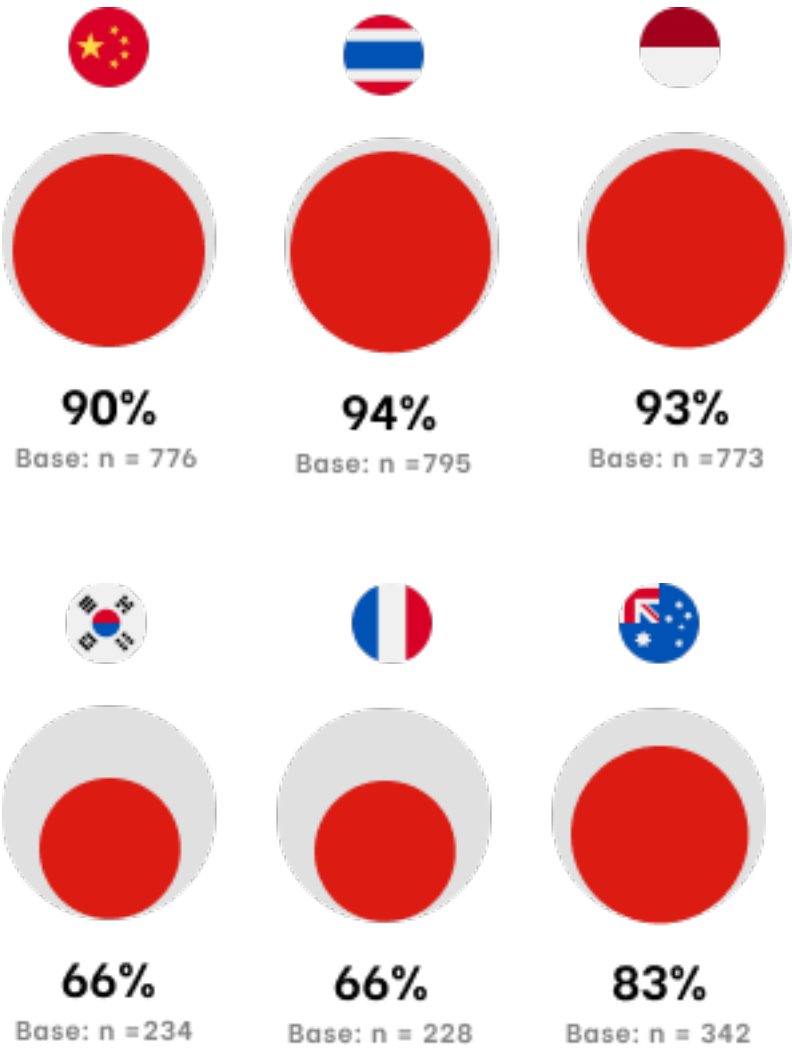
Poor impressions, low consumption – but nonetheless still satisfied

It's also worth noting that despite having a low proportion with good impression of SG arts, UK audiences find their purchase of SG arts highly satisfactory (88%).

Australian audiences too, rank low in their purchase of SG arts (55%), but nonetheless report highly satisfaction (83%).

While it bears further scrutiny to evidence, these suggest some potential to retain UK and Australian audiences who have purchased SG arts, and develop stickiness over time.

Levels of satisfaction with SG arts purchased





# ATTENDANCE OF SINGAPORE ARTS





# ATTENDANCE OF ARTS EVENTS IN AND OUTSIDE SG

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Of all the markets, Thai audiences are most likely to have attended SG arts events when visiting Singapore, as well as beyond the shores of Singapore. Other SE Asian (i.e. Indonesian, Malaysian) and Chinese audiences also have high levels of attendance at SG arts events in and outside of SG. South Korea consistently has the lowest levels of attendance of Singapore arts events both for events inside Singapore and events outside Singapore.





# ATTENDANCE OF SG ARTS EVENTS

## Attendance of SG arts events in Singapore

Thai (88%), Indonesian (87%), and Chinese (79%) audiences boast the top 3 highest attendance of SG arts events in Singapore.

Meanwhile, Australian (54%), South Korean (53%), and Hong Kong (56%) audiences rank the lowest in attendance of SG arts events in Singapore.

## Satisfaction and attendance

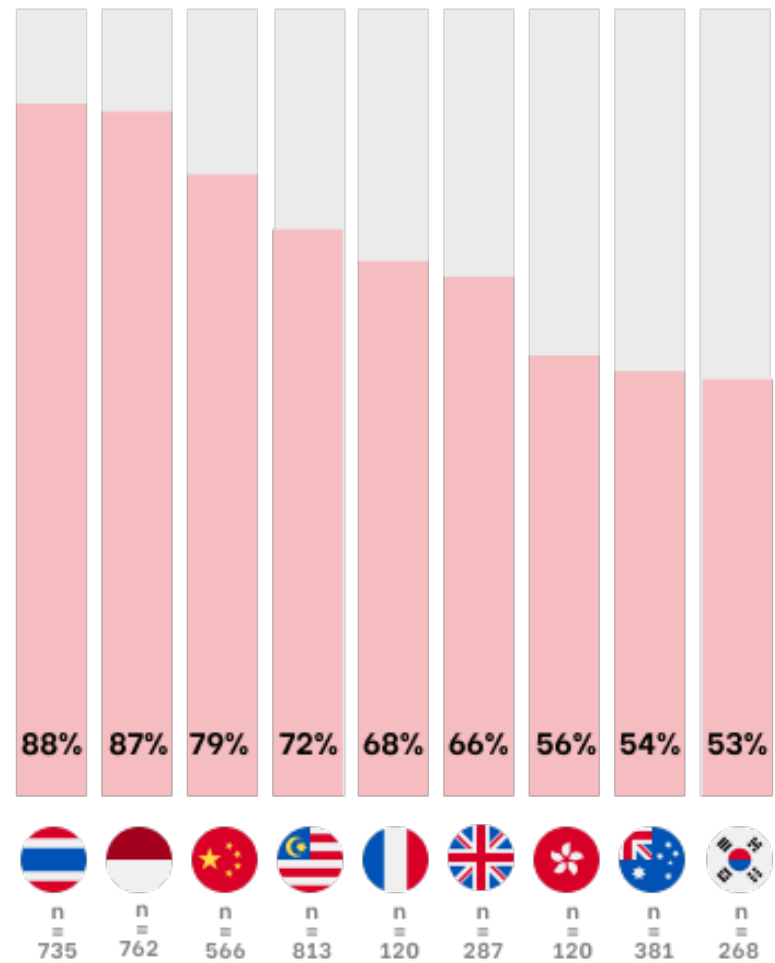
Markets with the highest audience attendance (of SG arts events in SG) also see the highest satisfaction levels (Indonesia: 96%, Thailand: 97%, China: 90%).

Meanwhile, markets with the lowest attendance see low satisfaction scores amongst audiences (South Korea: 77%, and Hong Kong audiences (79%).

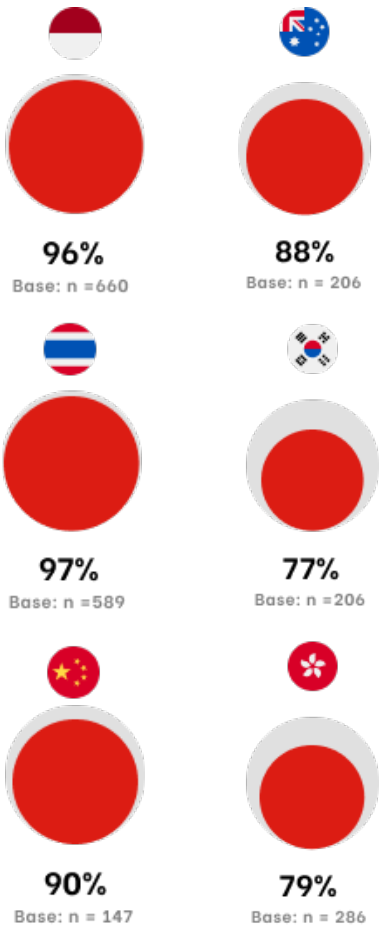
Australian audiences stand out in their relatively low attendance, yet high levels of satisfaction (88%).

French audiences too, buck the trend with the lowest satisfaction levels for audiences from all markets, despite middling attendance.

Levels of attendance



Levels of satisfaction





<https://www.artweek.sg/events/aliwal-urban-art-festival-2020>

## Attendance of arts events in SG and art forms consumed

When in Singapore, audiences seem to attend heritage-related events and music performances, regardless of audience attendance levels.

Comparing the types of art events audiences attend in SG to the types of art forms audience generally consumed, there seems to be slight overlaps, but no conclusive evidence of correlation.

Malaysian audiences for example, rank dance as one of the top 3 art forms they would generally consume. One-third Malaysian audience also attend dance events when visiting Singapore.

Hong Kong and Thai audiences with a general preference for community arts events, also seem to attend community arts events in Singapore. French audiences differ in this regards, in their attendance of community arts events in SG, but not in their home country / in general.

## Attendance in key festivals

Thai, Indonesian and Malaysian audiences are noteworthy not just in their high attendance of arts events in SG, but also in attendance of major arts festivals.

Indonesians and Thai audiences stand out in their high engagement with visual arts, and attendance of Singapore Art Week (Singapore Art Week (Thailand: 26%, Indonesia: 22%).

While Malaysia ranks 4<sup>th</sup> in audience attendance (72%) of SG arts events in Singapore, their participation in key arts festivals is much higher than that of other markets. A high proportion of audiences attend festivals such as Singapore Night Festival (Malaysia: 30%, Thailand: 34%, Indonesia: ), SGIFF (Malaysia: 22%, Thailand: 21%, Indonesia: 22%), and Singapore Heritage Festival (Malaysia: 21%, Thailand: 27%, Indonesia: 21%).

Given the temporality of events, one can conjecture that the close geographical proximity allows for ease of travel for audiences in neighbouring Southeast Asian markets.



ATTENDANCE OF SG ARTS OUTSIDE OF SINGAPORE

Attendance of SG arts events outside of SG

Across 9 markets, audiences' attendance of SG arts events outside of Singapore is lower than attendance of SG arts events in Singapore.

Similar to attendance of SG arts events in Singapore, Thai (78%), Indonesian (72%), and Chinese (69%) of audiences remain top 3 highest attendees.

Australian (37%), South Korean (25%), and Hong Kong audiences (47%) remain consistent in their low attendance outside of Singapore. French audiences (42%) unseated Hong Kong in the 3<sup>rd</sup> place for lowest attendance. Overall, Western audiences are less likely than average to engage outside of Singapore.

Satisfaction and attendance

Not only do the three markets – Thailand, Indonesian, China – see the highest audience attendance (of SG arts events in and outside of SG),

they also see the highest satisfaction levels (Indonesia: 93%, Thailand: 94%, China: 87%).

Similar to the low attendance and satisfaction of SG arts in Singapore, South Korean (68%) and Hong Kong audiences (68%) report low satisfaction in their attendance of SG art events outside Singapore.

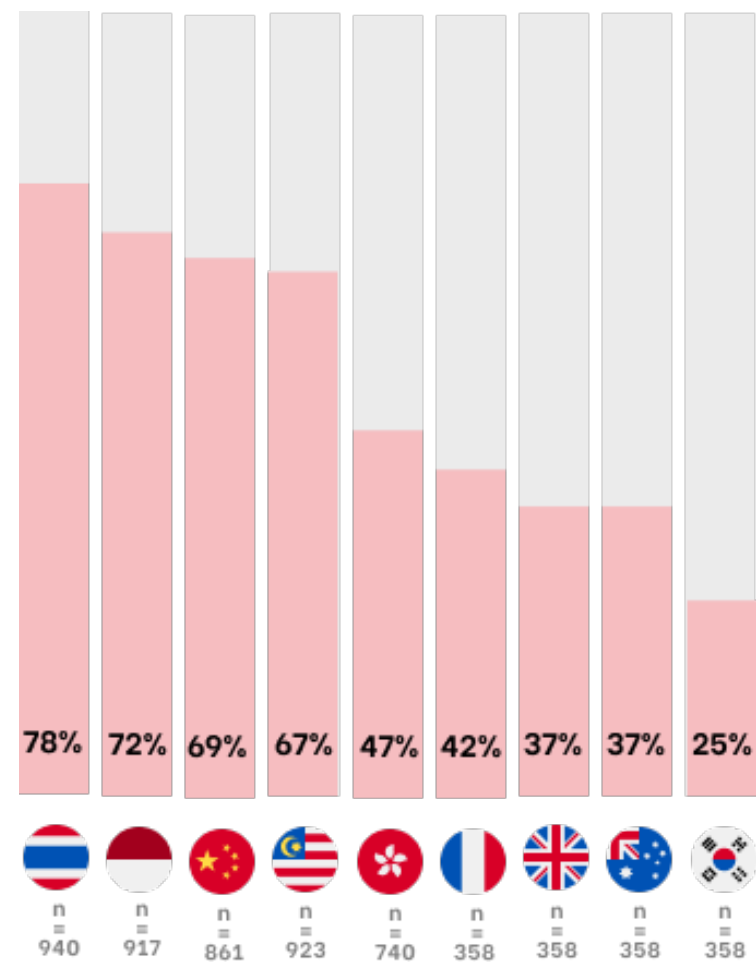
Audiences across all 9 markets see a slight decrease in their satisfaction level for SG art events attended outside Singapore.

Surprisingly, French audiences report high(er) levels of satisfaction (74%) when attending SG arts events outside of Singapore, compared to in Singapore (55%).

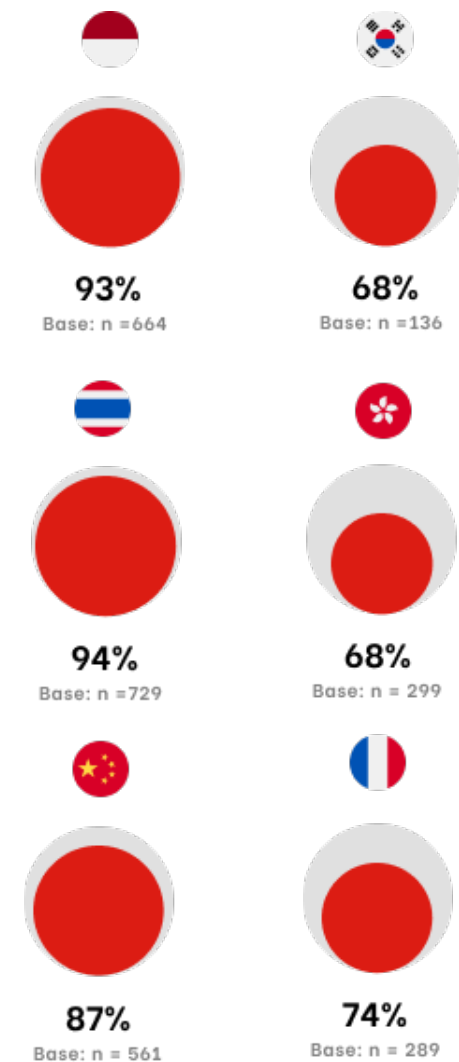
Attendance of arts events outside of SG and art forms consumed

Theatre, music, and dance are amongst the most common SG art forms consumed by audiences outside of Singapore.

Levels of attendance



Levels of satisfaction



SG music comes up as the most consumed art form online, outside of Singapore. Southeast Asian audiences rank highest in Singaporean music consumers outside of Singapore.



**62%**

of Indonesian audiences consume Singapore music



**51%**

of Malaysian audiences consume Singapore music



**59%**

of Thai audiences consume Singapore music

Of these, SG theatre performance emerges as the top art form most attended in-person outside of Singapore.

Most markets with audiences who attended theatre events in Singapore also seem to have engaged with SG theatre outside of Singapore.

In this regard, French, South Korean, and Thai audiences stand out for their attendance of SG theatre events outside of Singapore – with seemingly low attendance of theatre in Singapore.

SG music comes up as the most consumed art form online, outside of Singapore. Southeast Asian audiences (i.e. Indonesian (62%), Malaysian (51%), and Thai (59%) audiences) rank highest in SG music consumers outside of Singapore.

Hong Kong (50%) and Australian audiences (50%) too, surprise with their higher consumption of SG music in comparison to Chinese audiences (42%).

This suggests that despite Chinese audiences' general interest in music as an art form, few are tuning in to SG music outside of Singapore.

Meanwhile SG visual arts seems to have its staying power as one of the most consumed art forms in and outside of Singapore.

With the exception of Malaysian and South Korean audiences, visual arts is ranked as one of the top art forms consumed / attended outside of Singapore.

There are however, slight nuances to be held in audiences' consumption pattern of SG visual arts outside of Singapore.

Indonesian, and Western audiences (i.e French, UK and Australian audiences) seem to prefer engaging / consuming with SG visual arts online.

Whereas Chinese, Thai, and Hong Kong audiences seem to prefer consume SG visual arts in-person while outside of Singapore.



# LIKELIHOOD TO CONSUME SG ARTS



# LIKELIHOOD TO CONSUME SG ARTS

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Chinese and Southeast Asian audiences are most likely to consume Singapore arts in the next 12 months.

Meanwhile, South Korean, French, and Australians are the least likely to consume Singapore arts in the next 12 months.





# LIKELIHOOD TO CONSUME SG ARTS

Of all 9 markets, China and Southeast Asia (i.e. Malaysia, Indonesia, Thailand) have the highest number of audiences who self-reported likely/ very likely to consume Singapore arts in the next 12 months.

Chinese audiences (84%) self-reported likely / very likely to consume SG arts in the next months. This is followed with a close second – a tie between Indonesia and Thailand – with audiences (84%) self-reporting their likelihood to consume.

Malaysian audiences come in a short distant third (72%), but still distinctly ahead of Hong Kong audiences (49%).

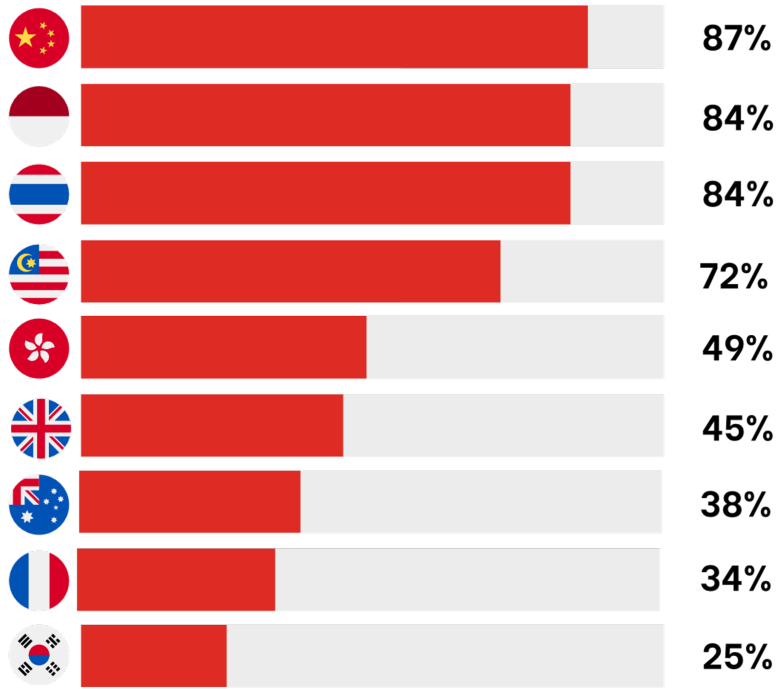
Conversely, South Korea, France, and Australia have the lowest percentage of audiences who self-report likely / very likely to consume Singapore arts in the next 12 months.

Generally, audiences’ self-reported likelihood to consume seem to cohere with earlier discussions of audiences’ engagement and satisfaction.

Western audiences are less likely than average to engage with SG arts, particularly outside of Singapore, with mixed levels of satisfaction.

Overall, SE Asian and Chinese audiences have the highest engagement and satisfaction with SG arts, and are most likely to consume it in the future.

Bar graph of % of those who reported they were likely / very likely to consume SG arts in the N12M



## LIKELIHOOD TO CONSUME SG ARTS



<https://coconuts.co/singapore/lifestyle/spore-art-museum-opens-friday-with-musical-mushrooms-forced-flirting/>

**'Refuse' by The Observatory**

### Top drivers for consumption of SG arts

Using Bayesian Belief Network (BBN) analysis, we uncovered key factors which might influence each market's likelihood to consume Singapore arts.

Of all the 24 attitudinal statements, the top 3 most common drivers across markets were a perception that SG arts is relevant, SG arts is inspiring, and SG arts is interesting.

In the below sections, we'll only be focusing on the top 3 drivers for the markets with highest likelihood for consumption: China, Malaysia, Indonesia, and Thailand.





<https://unsplash.com/photos/jNGs6ys7MKk>

As a rising, young educated Chinese middle class make sense of their own histories and personal lives, they're consuming more art and have better appreciation of quality.

Not only are they more curious about who they are, where they come from, where they're going, they're also becoming more well-traveled and discerning in their taste.

While Singapore and China are perceived as having distinct socio-cultural histories, there is huge opportunity for SG arts to be more relatable and relevant.

Top factors to boost to improve consumption of SG arts

1. Relevance of SG arts
2. How polished SG arts is
3. Quality of SG arts

*"Chinese audiences find it important to know where they come from... The culture in the city, the people, and the place the artists come from."*

*- Beijing expert, IPS 2016.*

## DRIVING CONSUMPTION OF SG ARTS - CHINA

For starters, Chinese audiences already view SG arts in high-regards. Chinese audiences may not be as familiar with SG arts as audiences in other Southeast Asian markets, but they still have a good impression of SG arts.

China's arts may have burgeoned from the spike in international and domestic interest in the past few decades. However, being relatively younger than Singapore's art scene, China's art scene may still be lacking in the backend artistic, technical, and professional capabilities needed to make arts / creative production happen.

That Singapore is perceived as one of the 4<sup>th</sup> most vibrant city by Chinese audiences, and continues to be one of the top tourist destination for the rising middle class gives an indication that there's an opportunity to develop Singapore-China exchanges.

Not only are Chinese audiences willing to learn more about SG arts, Singapore's diplomatic stance towards China also places it in good stead for institutional and government-to-government partnerships.

All in all, these suggest strong potential for SG arts to develop partnerships at multiple levels with China.

***Beijing Dance Academy as a world renowned dance school that is highly acclaimed and performs on global tours***



<http://nwasianweekly.com/2018/09/beijing-dance-academy-to-perform-in-seattle/>

## RECOMMENDATION TO ENCOURAGE CONSUMPTION OF SG ARTS AND CULTURE

One could, for example, develop educational exchanges for students with other Chinese arts institutions from around China, and position Singapore as a thought leader in arts education.



## DRIVING CONSUMPTION OF SG ARTS - INDONESIA



[https://unsplash.com/photos/IBb\\_Y65z57U](https://unsplash.com/photos/IBb_Y65z57U)

A rising middle class and philanthropic backing of private arts spaces has seen a more educated audience with a growing appetite for the arts.

Indonesian audiences are highly familiar with SG arts (e.g. visual arts) and seem to have high purchase and satisfaction levels. However, SG arts is sometimes viewed as too precise and clinical.

Indonesia is also one of Singapore's biggest tourist source markets – suggesting that ample opportunities to drive consumption of SG arts in and outsidess of Singapore.

Top factors to boost to improve consumption of SG arts

1. Relevance of SG arts
  2. Availability of SG arts
  3. How well-known SG arts is
- 

*There is a bifurcation that happens in the Indonesian art world – at music, at the museum, and the institutional context. There are people who only trust the market, and then there are people who only trust the independent.”*

- Expert from Jakarta, Indonesia



## DRIVING CONSUMPTION OF SG ARTS - INDONESIA

Seeing that Indonesian audiences are already familiar with SG arts, it's essential that Singapore takes the lead in developing market access to promote SG arts.

Audiences are exceptionally willing to consume SG arts despite some having poor impressions of SG arts. This shows that Indonesian audiences are willing to experiment in their consumption of SG arts – provided that it's inspiring and relevant.

The burgeoning of private and independent art spaces in Indonesia, coupled with a willing market signals ripe opportunity to promote wider access of SG arts towards Indonesian audiences.

In addition, Indonesia's ascent to becoming one of the world's most important economy, and current openness to collaborate with Singapore in its arts policies means that Singapore could work with Indonesia on multiple levels – to develop thought leadership and support SG's foreign policy agenda.

Seeing that Singapore arts policies are held in high regard, and its funding/ political environment is perceived to be more stable, Singapore could develop co-funding and co-production agreements for SG artists to create artworks with Indonesian artists. Not only will this leverage the technical know-how and professionalism of SG artists, Singapore could also tap into the Indonesian networks for distribution and consumption.

***Kreatif Connections to celebrate Indonesia-Singapore artistic collaboration – by Ministry of Culture, Community and Youth***



## RECOMMENDATION TO ENCOURAGE CONSUMPTION OF SG ARTS AND CULTURE

To encourage the co-production and consumption of SG visual arts, SG could draft bilateral agreements allowing SG and Indonesian artists to leverage on the best of each others' capabilities, and develop Indonesian audiences' appetite for SG arts over time.



## DRIVING CONSUMPTION OF SG ARTS - MALAYSIA



As Singapore's closest geographical, historical, and political neighbour, Malaysian audiences are highly familiar with SG arts – perhaps overly so.

As one of SG's top source markets for tourism, Malaysian audiences have a high level of engagement with SG arts in and outside of Singapore, notably with arts festivals in SG.

Despite high engagement, consumption and satisfaction levels, Malaysian audiences still waver in their impression of SG arts – suggesting that SG arts could be positioned differently to Malaysian audiences.

Top factors to boost to improve consumption of SG arts

1. Strong SG arts scene
  2. Seeing good reviews of SG arts
  3. Authenticity of SG arts
- 

*"Singapore supports and facilitates global exchange. The big thing is maintaining that support because a lot of funders are moving from a global to an inward-looking perspective."*

***We're also looking at capacity development, so programmes that develop the next generation of artists and arts workers is really important."***

- Expert from Kuala Lumpur, Malaysia



## DRIVERS TO CONSUME SG ARTS - MALAYSIA

Malaysians seem to be motivated by good reviews – more so than the quality of artwork or a desire to support a specific artist.

Given that most Malaysian audiences are familiar with SG arts, hearing or seeing reviews via word-of-mouth, publications, or social media can strengthen the perception that SG arts is inspiring.

In addition, Malaysian audiences seem to be keenly aware of ground development in SG arts, especially for SG music and arts festivals. SG arts spaces are perceived to be “nearest (international) opportunity to play”. Independent music magazines in the past have also created an imagined SG-MY music scene – its absence of which is sorely missed amongst Malaysian audiences.

Positioning SG arts as interesting, inspiring, innovative, and relevant is crucial to developing the Malaysian market for SG arts consumption.

Seeing how Malaysian artists, audiences, and experts view SG art spaces, there could be potential to develop close bilateral ties for residencies between Singapore and Malaysia.

In addition, Malaysian audiences visitorship cannot be downplayed. There remains a huge potential to develop more festivals and events to cater to Singapore’s closest neighbour.

***Malaysian Music ensemble  
GhaMuhyi works with  
Singapore collaborators to  
perform locally composed  
originals and ghazal classics***



<https://www.esplanade.com/festivals-and-series/pesta-roya-malay-festival-of-arts/2020/screening-ghamuhyi-crossing-the-boundaries-of-ghazal>

## RECOMMENDATION TO ENCOURAGE CONSUMPTION OF SG ARTS AND CULTURE

Strengthening the diversity of Singapore arts spaces not only allows SG artists to showcase their works, it also lets Malaysian artists aspire to show their works in Singapore. These platforms can be used to allow artistic talents to exchange ideas and technical know-how.



## DRIVING CONSUMPTION OF SG ARTS - THAILAND



<https://unsplash.com/photos/JTAR4XJ7FbA>

Thai audiences rank consistently high in their levels of engagement, consumption, satisfaction, and impression of SG arts. They also ranked SG highly on the top most vibrant cities in the world.

However, Thai audiences' desire for authenticity in SG arts suggests that they perhaps view Singapore as too clinical.

In addition, while Thai audiences feel that SG arts is easy to find online, some feel it is not yet widely popular and available.

Top factors to boost to improve consumption of SG arts

1. Popularity of SG arts
2. Authenticity of SG arts
3. Quality of SG arts

*“You know Singapore didn't have a strong art scene to begin with, but because of the investment that the government put in to attract regional work, they can make themselves like a centre for regional Southeast Asian art.”*

- Expert from Bangkok, Thailand



## DRIVING CONSUMPTION OF SG ARTS - INDONESIA

Amongst audiences from 9 markets, Thai audiences seem most interested in heritage and community arts events.

Thailand's healthy creative economy is an example for SG arts. Its businesses, artists, and spaces have come together to position Thai artists in unexpected spaces (e.g. temples, malls, heritage trails).

Singapore could create bilateral agreements especially seeing how Thailand is one of Singapore's tourism source markets. Not only could SG arts learn from how Thai arts introduces arts relevance through lifestyle, it could learn how Thai spaces are managed through public-private partnerships.

On top of developing higher visitorship from Thailand, Singapore could also leverage on their diverse spaces (e.g. Bangkok art galleries and ground-up art initiatives) to position its younger artists -- allowing SG artists to use Thai spaces as reputational springboards.

In addition, Thai audiences' high attendance of major arts festivals in Singapore suggest that there might be opportunities to develop a regional creative event to celebrate Southeast Asian Art.

Seeing that Thai audiences are more likely to consume SG arts if they have enjoyed something similar before, or came across it, Singapore could encourage production and circulation of SG art reviews for Thai audiences to get information and build an online community for SG arts.

**Bangkok Art & Culture Centre  
(BACC)**



<https://www.prestigeonline.com/th/pursuits/bangkok-art-and-culture-center-bacc/>

## RECOMMENDATION TO ENCOURAGE CONSUMPTION OF SG ARTS AND CULTURE

Singapore could facilitate artistic and discursive exchange amongst artists, especially on engagement of community issues. This could be online or offline. Artist exchange and residencies between Thai and SG artists in diverse, independent spaces could become reputational springboards for SG artists.



# APPENDIX

- [1] The study was conducted by Tom Fleming Consultancy, and is based on 60 in-depth interviews with arts and cultural experts in Singapore and in four leading creative cities (ie Beijing, London, New York, Tokyo), as well as online surveys with 4,000 arts audiences in Beijing, Jakarta, London and Melbourne
- [2] The findings inform three key pillars of the SG Arts Plan – A Creative Economy, A Connected Society, and A Distinctive City
- [3] Since our survey is administered online, this yielded difficulties especially for recruitment of seniors over the age 65 y.o. This resulted in some markets such as China and Hong Kong having few senior respondents – clearly not representative of China and HK’s ageing population.
- [4] Malaysian audiences, who also report high familiarity with SG arts, did not rank Singapore as one of the top 5 most vibrant cities
- [5] We ranked the cities based on number of times each city was mentioned, and assigned weights to the ranking (1 weight for least vibrant, 5 weights for most vibrant)
- [6] While the same markets are listed as Top 5 most vibrant cities in IPS 2016 and IPS 2021, it’s inaccurate to compare anything beyond for three reasons: 1) the city options included in IPS 2016 may be differ from city options in IPS 2021, 2) base sizes for IPS 2021 (n=9000) are noticeably more than base sizes for IPS 2016 (n=3848), and 3) audiences surveyed in IPS 2021 are sourced from more markets.
- [7] Unsurprisingly, commercial film *Crazy Rich Asians* came up as one of the most well-known works to be associated with Singapore. While some art films were mentioned (*A Land Imagined*, *Ilo Ilo*, *15*, *A Yellow Bird*), none received significant mentions across all audiences.
- [8] This however, does not seem to be strongly correlated, as in the case of Australia, South Korea, and Hong Kong (which ranked in SG’s top 15 IVA), but did not rank SG as a top 5 most vibrant city, and had comparably lower impressions of SG compared to other markets. <https://www.stb.gov.sg/content/dam/stb/documents/statistics-marketing-insights/Quarterly-Tourism-Performance-Report/STB%20Q4%202019%20FA%20v7.pdf>