



Yung Raja



Melissa Tan



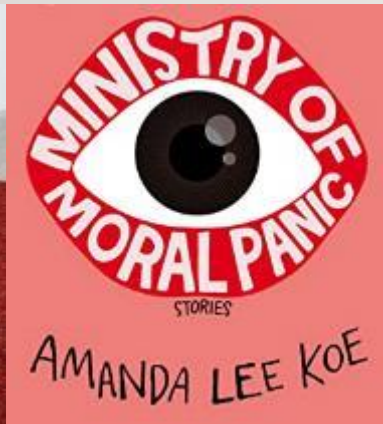
MessyMsXi



Light to Night



Jane Lee



Amanda Lee



Next Most Famous Artist



Siti Khalijah



Wild Rice @Funan

OUR SG ARTS PLAN 2023-27



The post-Covid world of 2023-2027 will be drastically different from the past with disruptive forces of change impacting many aspects within the socio-economic realm.



Global Environment

US-China-Russia-Ukraine

The strategic trajectories of US, China, Russia and Ukraine impacts the geopolitical environment.

Sustainability

Biodiversity loss and climate change has direct and complex economic and social impacts.



Economy

Economic Transformation

Globalization has enabled economic transformation incldg the rise of the global middle class; est 65% of pop in 2030, 90% from Asia (*The New Global Middle Class Investment Theme*).

Inflation

is increasing worldwide, with higher interest rates reducing real incomes, exacerbated by food & energy prices hitting record highs.



Society

Ideological Clashes

are increasing in frequency and growing in diversity and complexity.

Rise of the Silvers

Older persons (65 & above) comprise the world's fastest growing age group (*World Population Prospects 2019, United Nations*).



Technology

The Digireal

Boundaries between physical & virtual worlds blur. Digital/game dynamics bleed into the real world.

Open Access

Tech advances & changing values democratise knowledge generation/access.

What are the Implications on the arts sector?

1. How might global tensions reshape regional geopolitics and **affect our internationalisation strategy?**
2. How may sustainability & climate change **affect the way artists produce art?**
3. How will the rise of the middle class & silvers change our **audience development efforts?**
4. How can art bring people together by **providing a platform for the exchange of different perspectives?**
5. In the hybrid world of digital & physical, what are the **new possibilities for the arts & how do we harness them?**

The post-Covid world of 2023-2027 will be influenced by 5 macro trends in the arts world.



Arts made accessible

Proliferation of **social & digital media** lowers barriers to arts consumption

Gained traction during pandemic as more arts players strive towards **increasing accessibility**

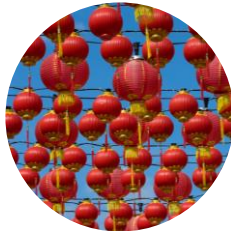
80% of SG arts audiences are engaging with the arts digitally (NAC 2021 Covid-19 Arts Consumption Study)



Arts for a cause

The connection between arts & causes will become more pertinent as younger generations look to the **arts for self-expression & a medium for change**

64% of SG arts audiences believe that the arts give a better understanding of people of different backgrounds & cultures (NAC 2021 Covid-19 Arts Consumption Study)



Asian cultural wave

Asia's cultural wave in entertainment & arts is redesigning the blueprint for content & engagement.

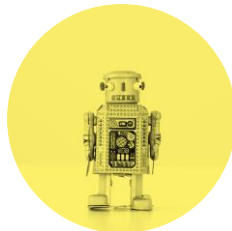
In 2017, the Chinese TV & film industry exported US\$400M of content (McKinsey Global Institute 2019, China and the World).



De-linearisation of arts

Traditional business models of the arts are disrupted by **digital platforms** that remove barriers between consumer & producer, **enabling anyone to be an artist.**

1,300 #MadeInSG listings, an initiative btw SG Brand Office & Carousell, allows freelance artists to engage consumers & sell creative works (The Straits Times 2020, Arts community & Home-grown biz rally to help freelancers)



Arts as lifestyle

The line between arts & entertainment are increasingly blurred.

New mediums are emerging, **changing perceptions of what the arts can be & where it can exist.**

77% of U.S. consumers agree 'the Internet has played a major role in broadening boundaries of what is considered art.' (Pew Research 2013, Arts Organisations & Digital Technologies)

Arts attendance in SG is comparable to mature arts countries such as UK, US & Australia.

PRE-COVID

- 7 in 10 Singapore residents **attended (physically)** at least one arts event/activity in the past 12 months (2019).

69%



2019 Population Survey on the Arts

- About 7 in 10 Australian residents **attended (physically)** at least one cultural venue or event in person (2019).


68%



2020 National Arts Participation Survey

- About 3 in 4 UK residents had **attended and/or participated*** in the arts at least once.

76%



2019/2020 Taking Part Survey*

- About 1 in 2 US adults **attended** a visual or performing arts activity at least once in the past 12 months.

54%

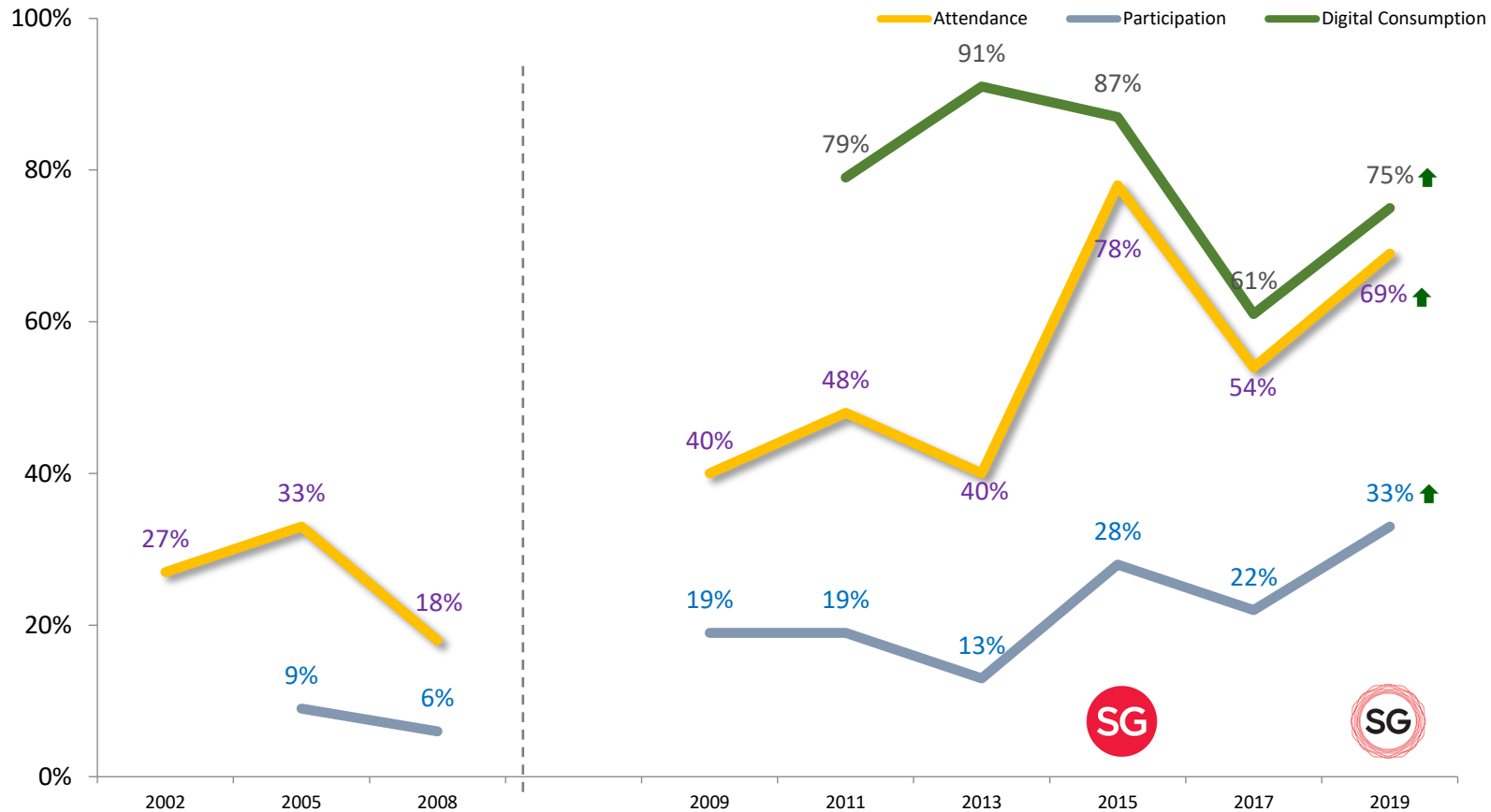


2017 Survey of Public Participation in the Arts

*Note: 2019/20 Taking Part Survey did not report 2 separate data points for attendance or participation in the arts. Arts engagement is reported instead and it refers to either attending and/or participating in a cultural or arts sector, for example, going to the theatre (attendance) or playing a musical instrument (participation).

Arts attendance & participation were on an upward trajectory of about 5.6% from 2009-19 until the Covid-19 pandemic curtailed capacity.

Overall Arts Physical Attendance, Participation, Digital Consumption – Wave on Wave; Art Forms



*A decision was taken to shorten the frequency between waves from 3 years to 2 years to better track changes in attendance, and 2009 aligned as the new baseline year with added questions

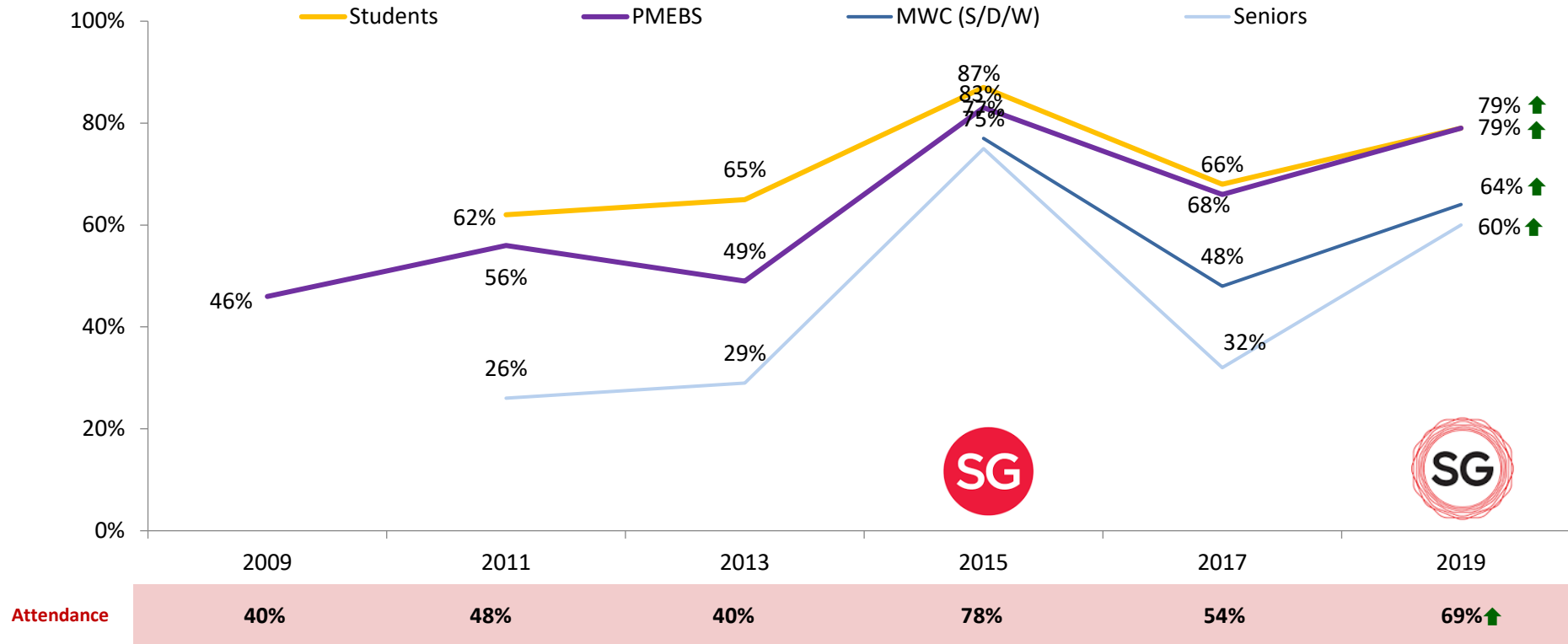
↑↓ Denotes significant difference from 2017 at 95% confidence level

B1. I would like to start by showing you a list of different types of arts and cultural performances, events and activities. In the past 12 months, did you attend this performance, event or activity in person?, Q034. In the past 12 months, in which of the following ways have you read any fiction or non-fiction books, stories, poetry or graphic novels (e.g. manga, comic books)?

Base: 2005 All respondents n=1477; 2008 All respondents n=1500; 2009 All respondents n=504; 2011 All respondents n=2038; 2013 All respondents n=2015; 2015 All respondents n=2041; 2017 All respondents n=2023; 2019 All respondents n=1176

Physical attendance in 2019 was the 2nd highest attendance levels since 2015 (SG 50), and this was observed among all life stage segments.

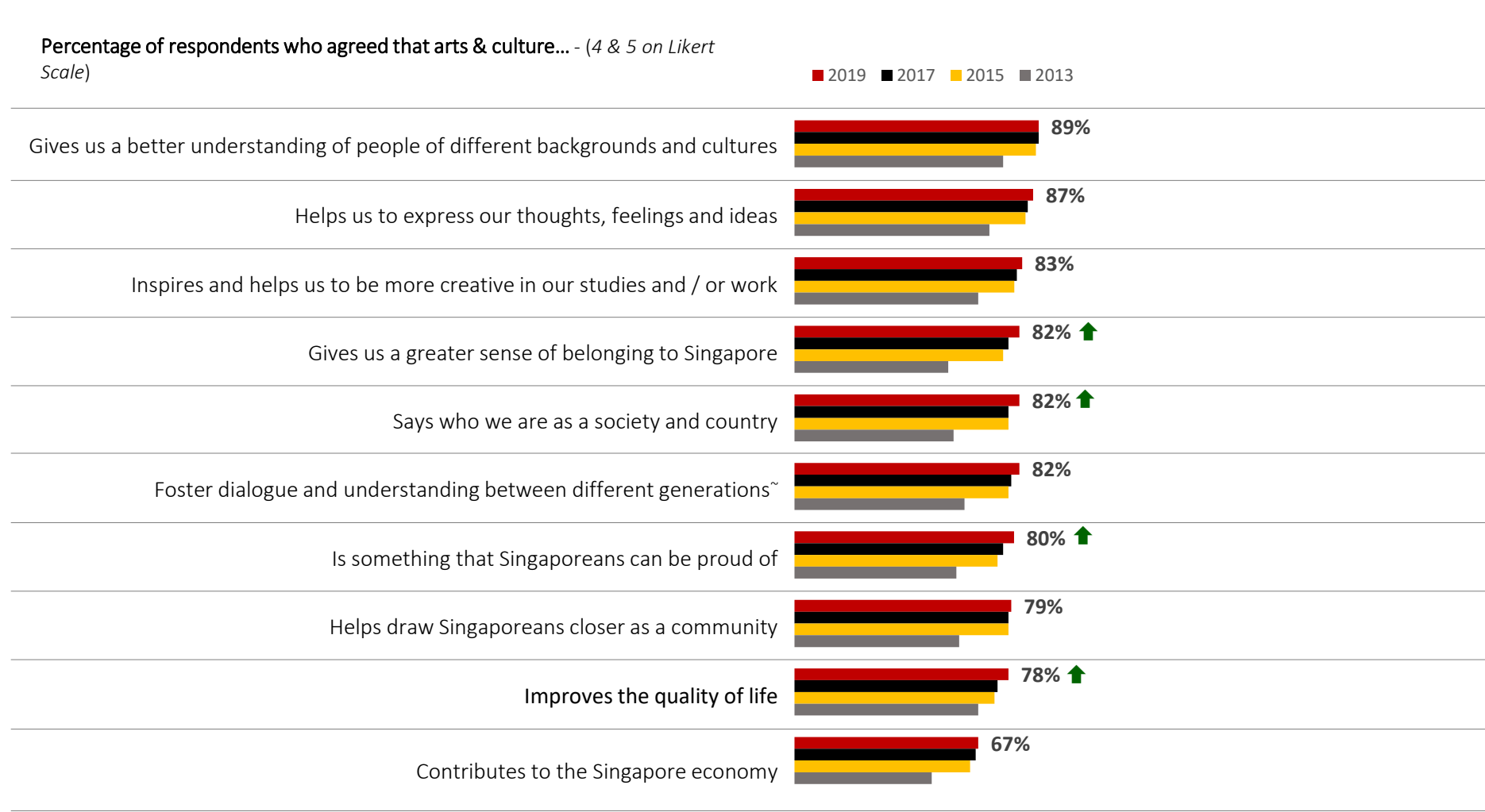
Overall Arts Attendance – Yearly; Life Stages



↑ ↓ Denotes significant difference from 2017 at 95% confidence level

B1. Here is a list of different arts and cultural events. Looking at this list, which of the following arts and cultural events and activities have you attended in the past 12 months in Singapore?
 Q017. In the past 12 months (i.e. in 2019), which of the following ways have you read any fiction or non-fiction books, stories, poetry or graphic novels (e.g. manga, comic books)? Please exclude newspapers, magazines, comic strips, technical books, self-help books, textbooks and podcasts.
 Base: 2009 All respondents n=504; 2011 All respondents n=2038; 2013 All respondents n=2015; 2015 All respondents n=2041; 2017 All respondents n=2023; 2019 All respondents n=1176

Perceptions towards the role of arts improved in 2019; specifically in creating a greater sense of belonging, strengthening nt'l identity, being a source of pride & improving the quality of life.

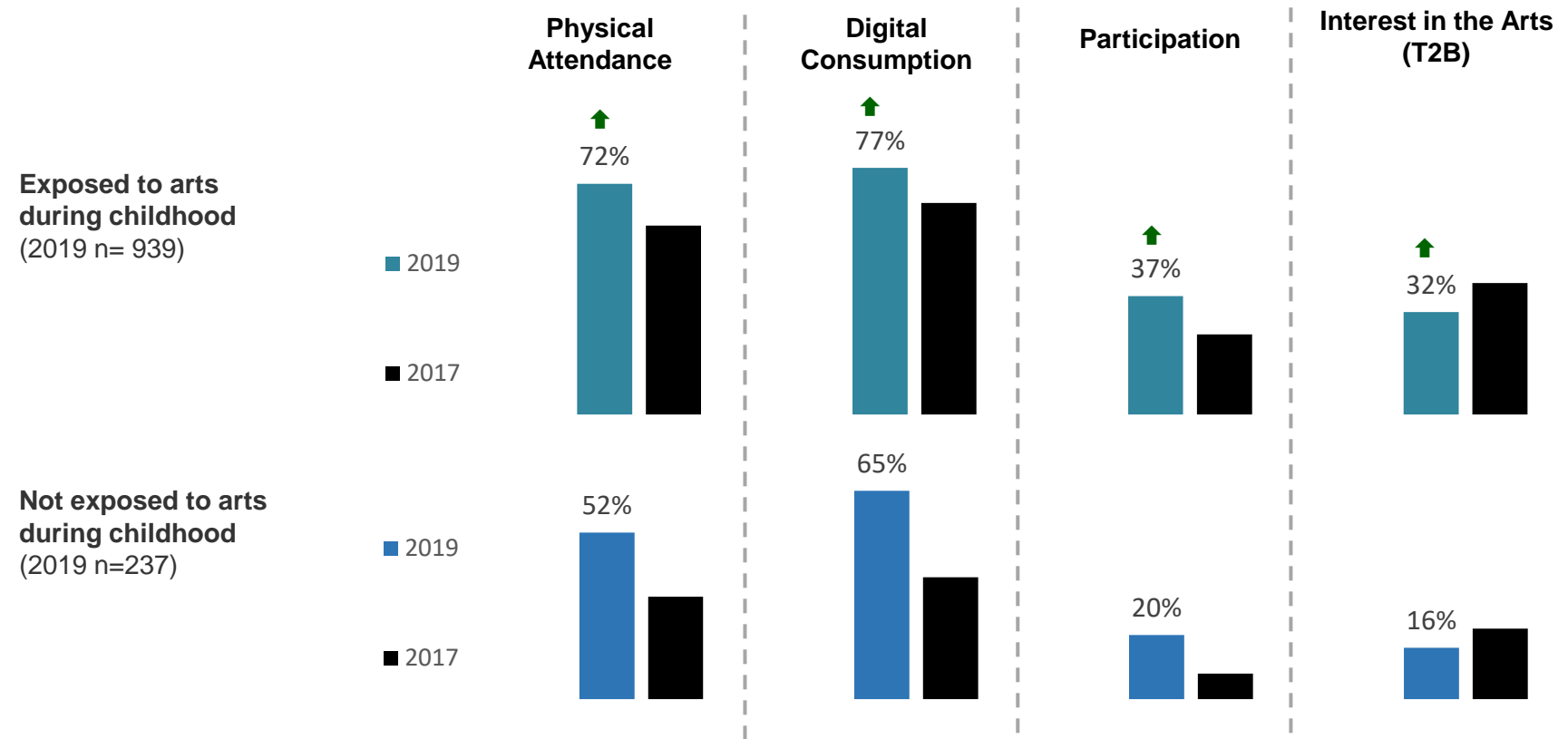


E1. We would now like to find out more about what you think of arts and culture in Singapore.
 Base: 2013 All respondents n=2015; 2015 All respondents n=2041; 2017 All respondents n=2023;
 2019 All respondents n=1176
 ~ Rephrased statement added in 2019 Survey
 # New statement added in 2019 Survey

↑ ↓ Denotes significant difference from 2017 at 95% confidence level

Exposure to the arts and culture in childhood is important as it uplifts one's general engagement with and interest in the arts.

Childhood Exposure in Arts and Cultural Activities on Arts Engagement – Wave on Wave



D11. Thinking about your childhood (12 years old and younger), which of the following arts and cultural events and activities did you engage in, attend or visit? Any others?
 Base: 2019 Exposed to arts during childhood n=939, 2019 Not exposed to arts during childhood n=237, 2017 Exposed to arts during childhood n=1657, 2017 Not exposed to arts during childhood n=366

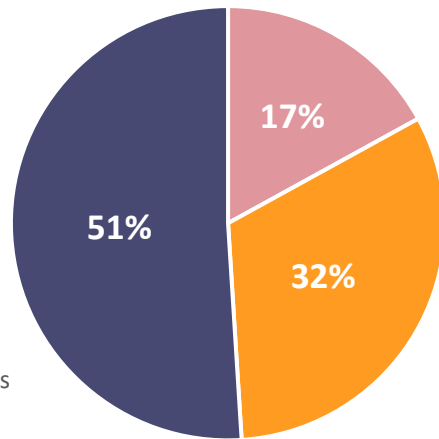
↑ ↓ Denotes significant difference from those not exposed to arts in childhood 2019 at 95% confidence level

There is a rise of arts philanthropy and corporate giving to the arts is expected to grow.

17% of companies currently give to the arts, and around a third are likely to start giving to the arts in the coming years.

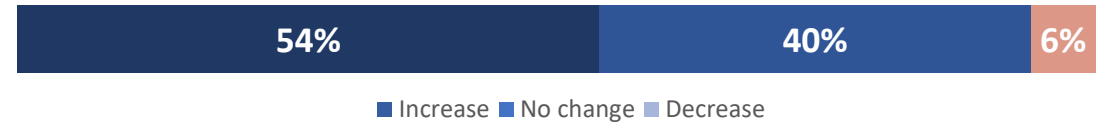
COMPANIES' PAST GIVING TO ARTS AND FUTURE LIKELIHOOD TO GIVE

- Given in the past 12 months
- Not given, but likely to start giving in the next three years
- Not given, neutral or unlikely to start giving in the next three years

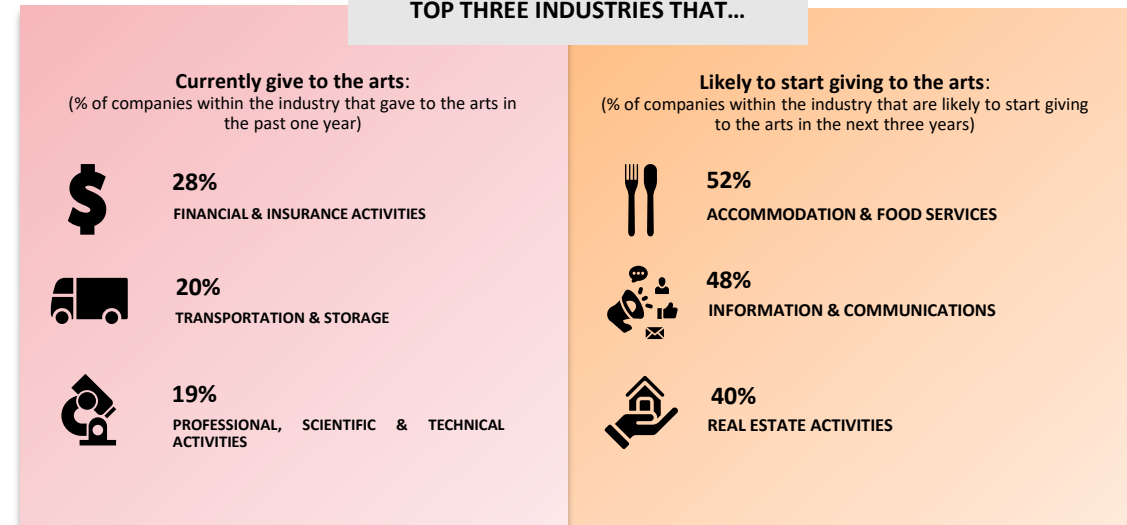


Looking ahead, more than half of current arts givers expect to increase their giving to the arts in the next three years.

EXPECTATIONS FOR GIVING TO THE ARTS IN THE NEXT THREE YEARS



TOP THREE INDUSTRIES THAT...



Building a sustainable arts ecosystem through strong partnerships, supporting artistic excellence & ensuring arts at every life stage for Singaporeans are key to Our SG Arts Plan.



ARTISTIC EXCELLENCE

An arts sector anchored by artistic excellence



STRONG PARTNERSHIPS

Develop strong strategic partnerships with People, Private & Public Sector



SUSTAINABLE ECOSYSTEM

Work with partners to build a sustainable ecosystem for the arts community to thrive



ART AT EVERY LIFE STAGE

Grow appreciation for & participation in the arts at every life stage

We will co-create and collaborate with partners and stakeholders to fulfil our strategy.



***A CONNECTED
SOCIETY***

*A community
anchored by shared
arts and culture*



A DISTINCTIVE CITY

*Vibrant Spaces
Inspired by and for the
Arts*



***A CREATIVE
ECONOMY***

*powered by Artistic
Talent, Excellence and
Innovation*

Our SG Arts Plan (2023-27) in a nutshell:



**For Singapore to be a
Creative Economy & Distinctive City,
Home to a Connected Society
that Cherishes the Arts & Culture**