

Arts in the post-pandemic normal

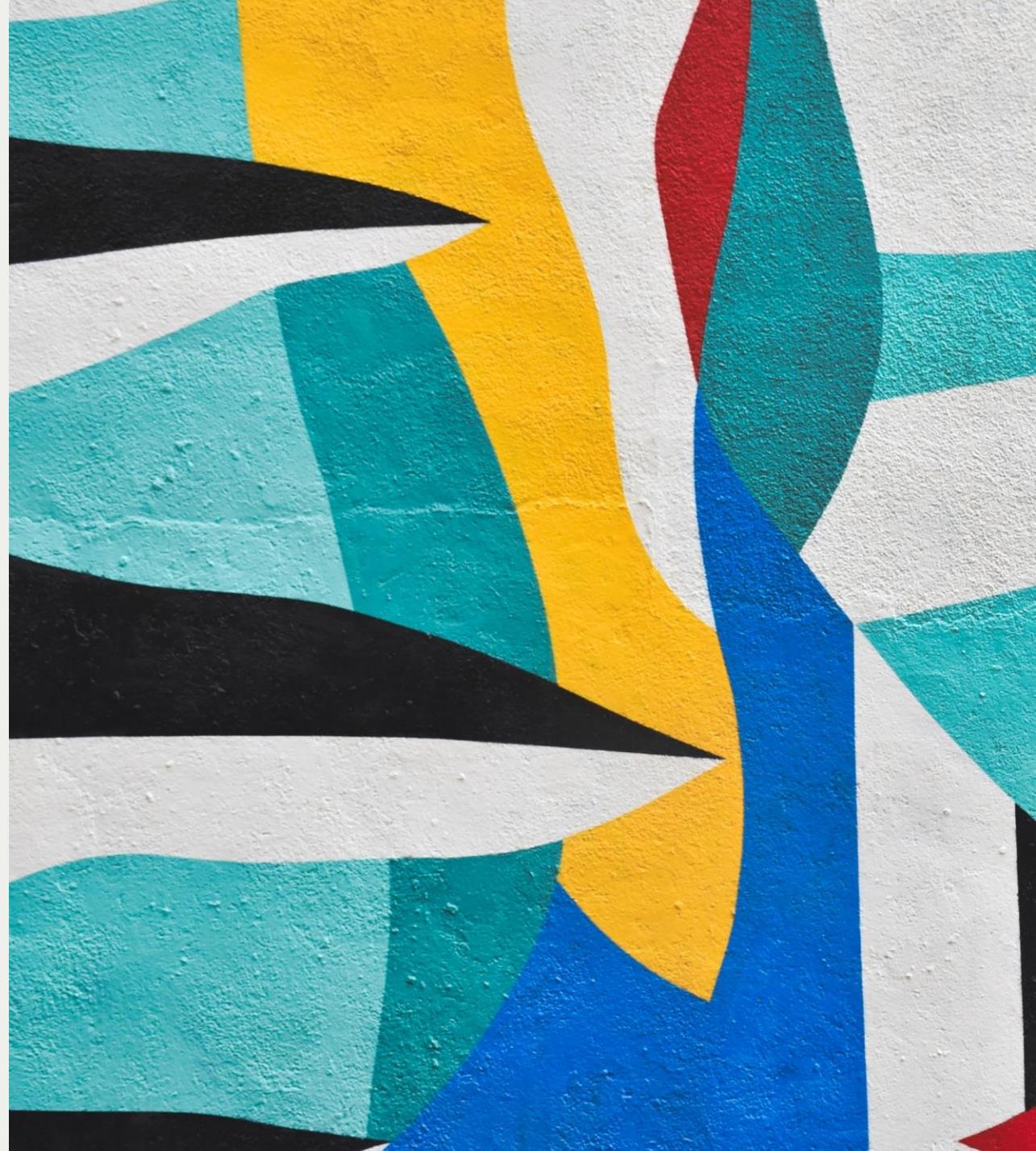
5 macro trends to watch

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A year of pandemic disruption

The emergence of COVID-19 brought sudden and widespread changes to the way we lived, worked and played.

Lockdowns, social distancing measures and closed borders meant more time at home, less social interactions, and less travel and escape. Job losses and a gloomier economic outlook meant less spending, particularly on activities involving higher risk of contagion, like attending live performances. These have taken a toll on mental health and well-being [1].

With Singapore now in Phase 3, more facets of our lives are resembling the pre-COVID normal. More of us are returning to our workplaces, more are spending time outside of home for social activities, and more report feeling calm and relaxed [2].

Yet as the pandemic drags on, Singaporeans are unlikely to return completely to pre-pandemic habits and behaviours. Work-from-home continues to be the default, which actually suits the preference of most employees [3]. Online shopping and spending on in-home entertainment are expected to remain buoyant throughout the recovery period [4]. And while well-being has improved over time, concerns around health, finances and employment persist [5].

[1] LKYSPP (2020) [How are Singaporeans Spending During the Pandemic?](#)

[2] NAC (2021) [COVID-19 Arts Consumption Study](#) (data from R3, 9 Nov 2020 – 4 Jan 2021)

[3] DIA Brands (2020) [Navigating the Next Normal for Brands](#)

[4] Milieu Insights (2020) [The Impact of Covid-19 on Consumer Spending on Home Entertainment](#)

[5] Probably Tomfoolery (2020) [The Great Realisation](#)

[6] Smith, J.W. (2021) [2020 is an 18-Month Year](#)

2020 is an 18-month year

“The first half of 2021 will be more of 2020, meaning more COVID and continuing restrictions and reluctance weighing on the marketplace. New coronavirus variants and delays in vaccination will keep the economy from getting past 2020 any sooner.

The middle part of 2021 will be less COVID as vulnerable populations like frontline workers, older people and people with pre-existing conditions get vaccinated in large numbers. This will open up opportunities related to family, celebration and commemoration.

The latter part of 2021 will be post-COVID, and it will materialise all at once as vaccinations reach levels that create herd immunity. There will be a surge back to the marketplace with opportunities related to revelry, exuberance, travel and anything providing a fresh start.”

- J. Walker Smith, Chief Knowledge Officer, Kantar [6]

How COVID-19 shifted arts consumption

During the Circuit Breaker and Phase 1, when home-based leisure was the norm, digital arts gained salience as an outlet for people to find meaning, connect with others and uplift mental well-being while confined indoors. Digital arts offered relief from reality as a form of self-care and helped to attract new arts audiences. The desire to learn something new and the opportunity to access something that would be otherwise unavailable continued to be key motivators for engaging with the arts online.

Whilst the vast majority of Singaporeans were engaged with some form of digital arts throughout 2020, digital arts consumption dipped slightly in early October when workers returned to the office, and shifted towards shorter content, on-the-go, after work consumption, and more passive discovery (versus intentional searching).

Nonetheless, the appetite for digital arts continues to hold strong and audiences are increasingly willing to pay for content that is specially created for online consumption. As we ease into the post-COVID future, arts-goers seem eager to embrace arts content that dwells less on the pandemic, instead celebrating social reconnection and the beginning of the post-COVID normal.

The challenge for local arts groups will be growing audience engagement in a way that leverages digital and online experiences, while still encouraging a return to in-person arts programmes.

50%

of Singapore arts audiences cited learning something new to be the reason they engaged in arts, followed by seeing something they wouldn't otherwise see (45%), and supporting their mental well-being (31%)

80%

of Singapore arts audiences are engaging in arts digitally, matching or exceeding levels (75%) before the Circuit Breaker in March 2020

1 in 2

Singapore arts audiences have paid for online arts content and would pay more for content specifically created for online consumption

2 in 5

Singapore arts audiences intend to dial back on physical arts attendance in the near future

Painting the road ahead

Looking ahead, Asia is expected to be the quickest region to recover from the pandemic, particularly countries that implemented strict public health measures early on and have robust national vaccination programmes underway. In Singapore, over 250,000 people have received their first vaccine dose (as of 1 March 2021), and the current momentum indicates that we will achieve significant progress towards herd immunity levels by the end of 2021.

However, Singapore remains at risk from uncertainties in the global landscape. Vaccine rollout programmes around the world have been stymied by logistical hurdles, structural inequalities and anti-vaccine ideologies ^[1]. Worryingly, more virulent COVID-19 strains have emerged that display higher resistance to the current vaccines in the market ^[2]. Thus the coming months and years are unlikely to bring a steady return to pre-COVID routines ^[3], but rather a series of disruptions and discontinuities that pave the way for a 'new normal'.

In this turbulent operating environment, it will be important for arts groups to leverage the shift to post-COVID social routines and underlying macro-signals that have been amplified by the pandemic. The home, for instance, will continue to influence consumer lifestyles as employers establish teleworking as a norm. Digital fatigue will fuel the desire to get out and engage physically, but the long-term direction is towards blended arts experiences and embedding new technologies like Virtual Reality (VR) and Augmented Reality (AR) into artistic practice.

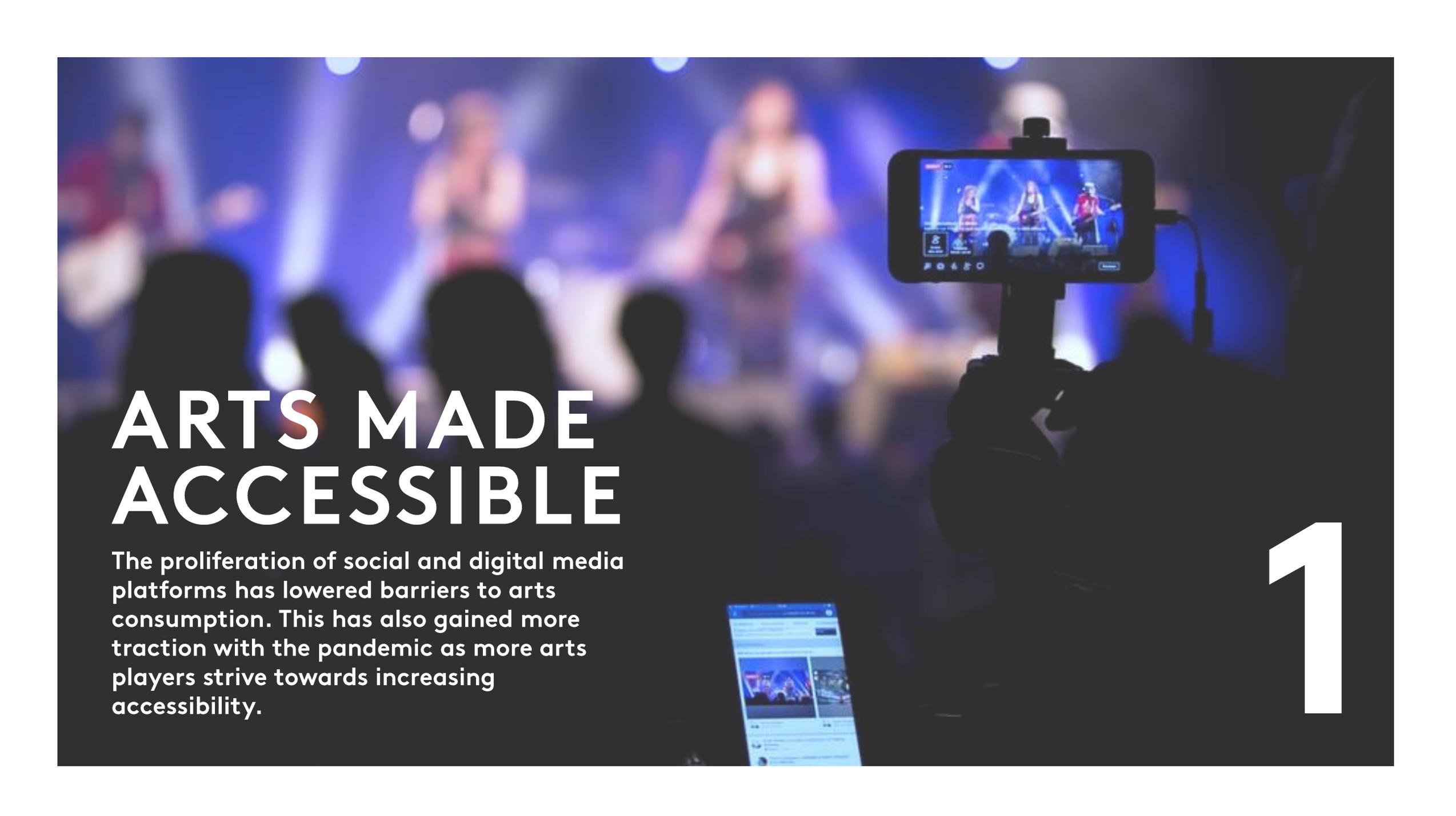
This Playbook identifies five macro trends that can help the arts sector transform the threats from disruption into new opportunities for growth and innovation.

[1] The Washington Post (2021) [*The Pandemic Leads to New Forms of Inequality*](#)

[2] CNBC (2021) [*CDC Director Warns COVID Variants Could Reverse the Recent Drop in Cases and Hospitalizations*](#)

[3] The Straits Times (2021) [*Global COVID-19 Herd Immunity May Take Nearly 5 Years, New Data Suggests*](#)





ARTS MADE ACCESSIBLE

The proliferation of social and digital media platforms has lowered barriers to arts consumption. This has also gained more traction with the pandemic as more arts players strive towards increasing accessibility.

1

Trend 1
ARTS MADE ACCESSIBLE

The underlying driving force

Digital platforms, especially social media, have increasingly become the preferred choice for accessing content.

65%

of global consumers used Instagram for arts-related purposes in 2019 (vs. 34% in 2015) ^[1]

59%

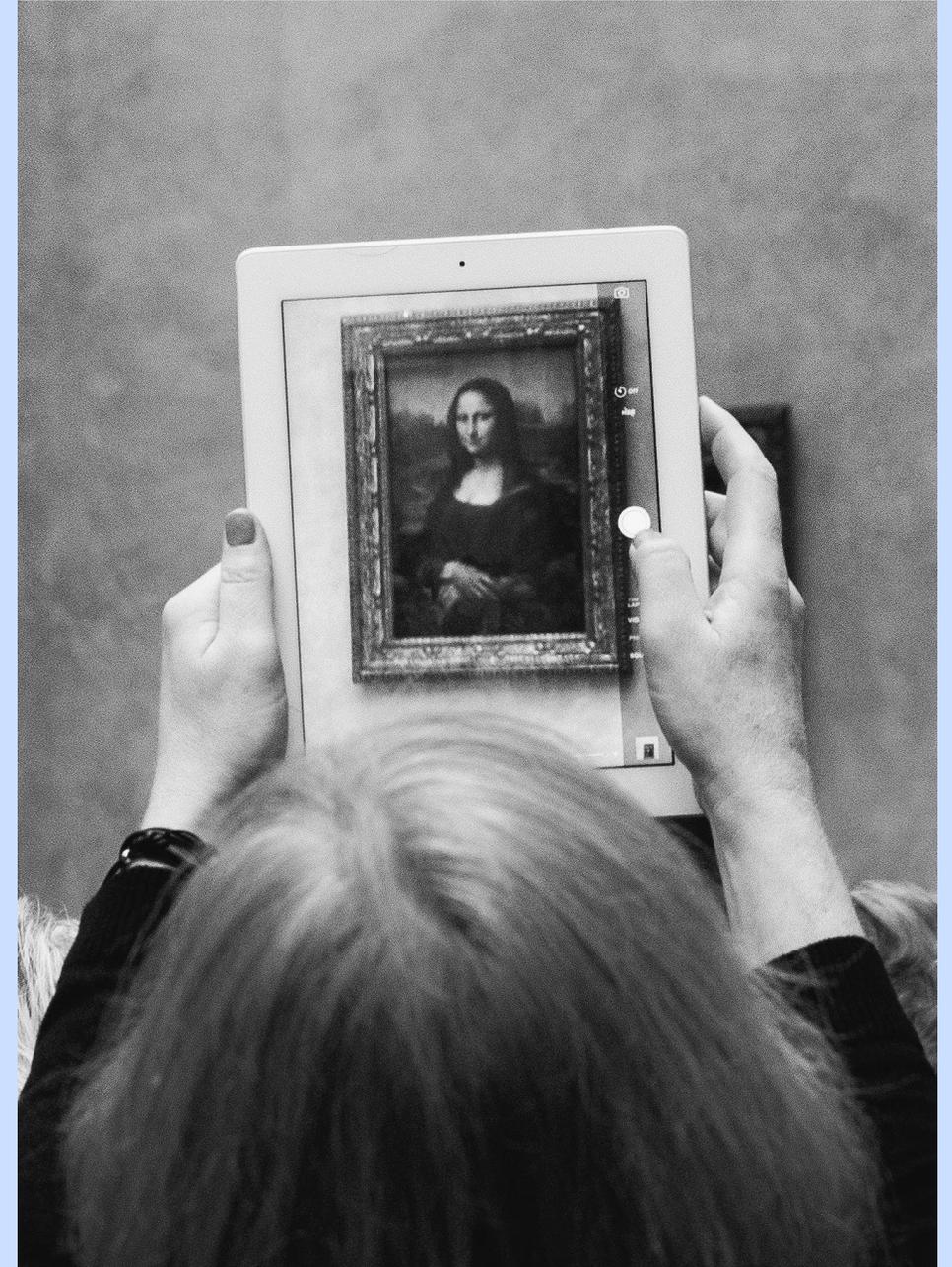
of global consumers agreed that the Internet is their main source of news and entertainment ^[1]

49%

of global consumers used their mobile phones or tablets to watch TV or stream movies in the past 30 days in 2020 (vs. 37% in 2016) ^[2]

[1] Kantar (2020) *Kantar Global MONITOR*

[2] Statista (2020) *Social Media Platforms Most Commonly Used for Art-related Purposes Worldwide from 2015 to 2019*



Changes with COVID-19

Lockdown restrictions have accelerated the growth of digital channels, focused on bringing content to the masses as a necessity for business survival.

[1] Musically (2020) [Top Music Channels on Twitch](#)

[2] Statista (2020) [COVID-19 Impacts E-commerce Site Traffic](#)

[3] NAC (2021) [COVID-19 Arts Consumption Study](#) (data from R3, 9 Nov 2020 – 4 Jan 2021)

Globally

17.6 million

hours of livestreaming took place on Twitch's 'Music & performing arts' category in July 2020 – up 387% year-on-year [1]

16%

increase in global website traffic for books and literature e-commerce platforms between January and March 2020 (1.34 billion to 1.51 billion) [2]

70%

increase in Instagram Live video streaming in the US from mid-to-late March 2020 vs. February 2020 [2]

Back home

70%

of Singapore arts audiences have visited arts websites or apps, significantly higher than pre-Circuit Breaker levels (46%). This uplift was particularly pronounced for YouTube and Spotify [3]

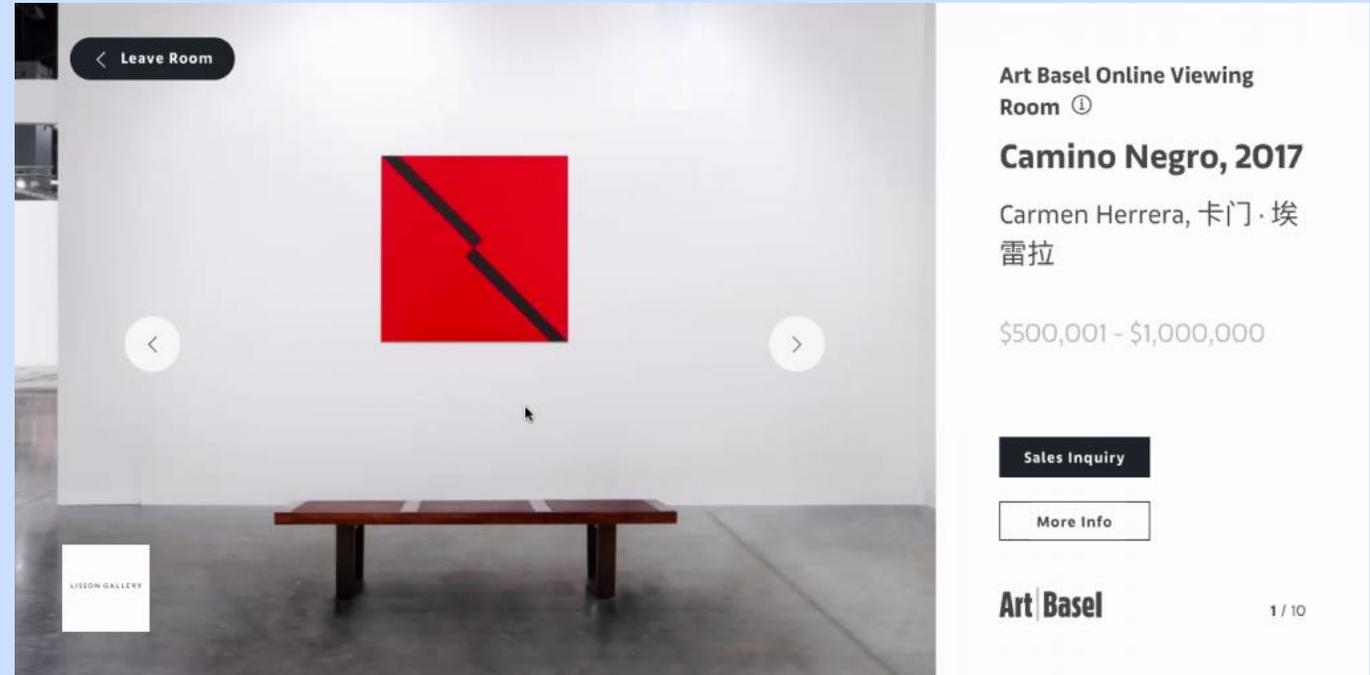
80%

of Singapore arts audiences are engaging with the arts digitally, matching or exceeding levels (75%) before the Circuit Breaker in March 2020 [3]

How this trend will sustain post pandemic

While consumers are expected to return to physical arts events, digital arts will still serve as a gateway with its own unique appeal and designed for greater inclusivity ^[1].

[1] Nikkei Asia Review (2021) *Coronavirus Prompts Visual Art to Turn Virtual*
[2] FAD magazine (2020) *Lisson Gallery Presents An Enhanced Virtual Experience*



250,000

Visitors attended Art Basel's 2020 online viewing rooms, far surpassing the 90,000 who attended in person in 2019 ^[2]

Trend 1 ARTS MADE ACCESSIBLE

Digital arts provides a risk-free environment for viewers to sample novelties, whetting viewers' appetites to engage with the arts more frequently [1].

REDUCING BARRIERS TO ENTRY

"So, so privileged to finally be able to catch this theatre classic at last. When else will I have this chance to attend Berlin's performance?"

- Online comment from a first-time attendee of Berlin Philharmonic Orchestra's concert [2]

UNIQUE APPEAL

"The interactions my friends and I have been having during this online concert is different. It's just wild."

- Online comment from attendee of TWICE concert [2]

"Goosebumps all the way..!! Sounds coming together from all over the world? Next level of collaboration. The greatest."

- Online comment from attendee of Dingyi music's cross-country collaboration [2]

[1] Washington Post (2020) [The Future of the Performance Art](#); Nikkei Asia Review (2021) [Coronavirus Prompts Visual Art to Turn Virtual](#)

[2] NAC (2021) COVID-19 Arts Consumption Study (data from R3, 9 Nov 2020 – 4 Jan 2021)

[3] HK Dance magazine (2020) [Marquee TV](#)



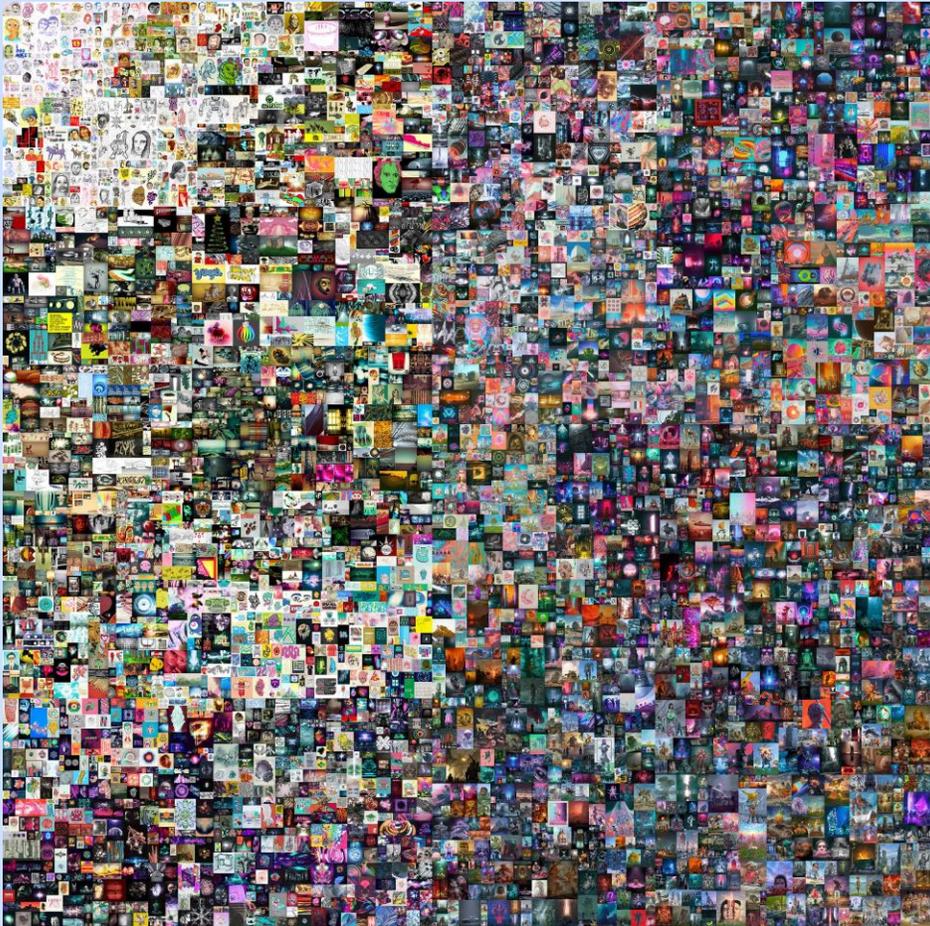
Marquee TV

Streaming service *Marquee TV* uses multiple cameras to bring the unique language of each production to the screen. Marquee's content is not simply archived films of live performances, but rather an immersive capture to allow viewers to 'sample' different artists or production before buying tickets to their show.

"The future is live and digital collaborations. We're an extension of what live organisations do, not a replacement."

- Marc Kirschner, Marquee founder and Head of Product & Innovation [3]

Global inspirations



[1] Wired (2021) *NFTs Boom as Collectors Shell Out to Own Digital Art*

THOUGHT STARTERS

- How can we encourage artists to harness cutting edge technologies and allow the arts to evolve into more seamlessly hybridised forms?
- How can we reframe digital arts for consumers and anticipate new forms of monetisation to help artists derive value from their work?

When technology and arts converge: New art forms and consumption patterns

As cryptocurrencies reach new all-time highs, young consumers are looking to collect digital art enabled by Non-Fungible Tokens (NFTs) [1]. Grimes recently sold around \$6 million worth of digital artworks after putting them up for auction on *Nifty Gateway*. Owned by Gemini, a crypto-exchange founded by the Winklevoss Brothers of early Facebook fame, Nifty Gateway allows artists to partner as 'Creators'. Through its online marketplace and auction platform, Nifty Gateway makes it easy for anyone to purchase a piece of limited-edition digital art and be an art collector, without the hassle of physical storage. As Asia's cities grow and see rising affluence, young consumers face the dilemma of housing spatial constraints while desiring to express themselves through the arts and conspicuous consumption. The Internet and Pop Culture have blurred the lines between high and low art.

Global inspirations

THOUGHT STARTERS

- How can we promote digital arts and museums as richer and distinct experiences, rather than just recreating real-world equivalents?
- Could we expand the breadth of activities in our arts venues to cater to a wider audience (e.g. cutting across art forms and modes of engagement)?



One stop art: Accounting for different arts interests

Together in Art, a digital space on the Art Gallery of New South Wales' website, brings together artists, educators and performers to create meaningful art encounters. The site allows guests to virtually browse art exhibitions, watch violin performances, attend art classes and even get a glimpse of behind-the-scenes tours of the gallery's prized collections, ensuring that there is always something for everyone [1].

[1] Broadsheet (2021) [Going Gallery](#)

Global inspirations



[1] Guggenheim (2020) *Guggenheim Introduces New Audio Experience with Mind's Eye*

THOUGHT STARTERS

- How can we encourage greater inclusivity, both from a content and channel perspective, for niche groups (e.g. persons with disabilities, migrant workers), which may also offer a novel experience for mainstream audiences?
- What digital technologies could we leverage to expand the audience experience in physical spaces, engaging with senses beyond sight?

Designing for inclusivity, bringing novelty for all

The Mind's Eye by Guggenheim New York [1] offers an alternative learning experience for those who are visually impaired by providing a way of 'seeing' art through voice, led by audio descriptions and conversations. The online guide is free of charge and features ten tracks, each describing one sensory aspect of the space – such as sound, touch, and light – to create a rich and revolutionary way to explore the museum.

ARTS FOR A CAUSE

The connection between arts and causes will become more pertinent than ever as younger generations look to the arts for self-expression and as a key medium for change.



2

The underlying driving force

Standing up for social issues has become increasingly important to younger consumers. Amongst Gen Z and millennial consumers, decisions are often guided by a reflection of their personal values and interest to see and effect change in the world.

[1] Kantar (2020) Kantar Global MONITOR

65%

of global Gen Z and millennial consumers agree that being seen as someone who stands up for what they believe in is 'extremely important' or 'very important' (vs. 59% in 2018) [1]

76%

of global Gen Z and millennial consumers agree that they are 'very likely' or 'somewhat likely' to contribute money or time to a charity or ethical cause in the next 12 months [1]

69%

of global Gen Z and millennial consumers agree that speaking out for what they believe is the right thing is 'extremely important' or 'very important' (vs. 65% in 2019) [1]



Changes with COVID-19

Arts are an effective medium for audiences to rally support around the social causes they are interested in. As COVID-19 exposes the world's social inequalities, more are engaging with arts on social media to rally and drive change.

1st

on ArtReview's Power 100 list was the Black Lives Matter movement. The Power 100 list typically ranks movers and shakers of the contemporary art world [1]



Fundraising through arts for Black Lives Matter

Black Lives Matter was just one of the many social movements in recent years that were largely youth-led, where arts also played a central role.

Arts for Philadelphia was created by a group of Philadelphia artists producing work in response to the protests against police brutality. Within 24 hours, its first print benefit raised over \$40,000 for the Philadelphia Community Bail Fund [3].

64%

of Singapore arts audiences believe that the arts give a better understanding of people of different backgrounds and cultures [2]

Visual arts for advocacy

The lockdown has provided time and space for Singaporeans to express their thoughts and raise awareness about what they care about. Visual art is one of the most common shareable mediums (e.g. promoting representation of minority groups via EZ-Link stickers) [4].



[1] Art for Philadelphia (2020) *About Art for Philadelphia*

[2] NAC (2021) *COVID-19 Arts Consumption Study* (data from R3, 9 Nov 2020 – 4 Jan 2021)

[3] The Guardian (2020) *Black Lives Matter Tops Art Power List After Year of Driving Change*

[4] The EZ-Link card is a contactless smart card used for the payment of public transportation fares in Singapore.

How this trend will sustain post pandemic

The arts have historically played the role of a mirror to society. As digital platforms mature, they provide an increasingly attractive alternative space to traditional venues. Artists have already begun exploring new content and modes of engagement to interact with audiences. In this two-way mirror, the arts will continue evolving to not just be the voice of the people, but a key medium to connect with and stay relevant to audiences, particularly the youth.

[1] NAC (2021) COVID-19 Arts Consumption Study (data from R3, 9 Nov 2020 – 4 Jan 2021)

[2] Highnunchicken (2018) #highnun

63%

of Singapore arts audiences view arts as a means to 'help express our thoughts, feelings, and ideas'. 65% agree that it is important to have arts experiences as part of the school curriculum [1]

Social discourse online through arts

Drawings by HighnunChicken, an Instagram account that features illustrations that make satirical commentary on current social issues. Its most viral comic has been shared more than 13,000 times on Facebook [2]



Global inspirations



[1] Tate (2015) [Turner Prize 2015 Artists](#)

[2] The Guardian (2015) [Turner Prize Winners Assemble: 'Art'? We're More Interested in Plumbing'](#)

[3] Superhero Me (2021) [About Superhero Me](#)

THOUGHT STARTERS

- What are some of the social issues Singapore faces today and in the coming 3-5 years? How can we raise awareness and help address these through the arts?
- How can we work together with multi-disciplinary artists to create inclusive spaces and practices to help disadvantaged communities?

Creating safe spaces through arts

New Genre Public Art, coined by Suzanne Lacy in 1991, defines a type of public art where artists will often spend much time integrating into the specific community which they wish to help, educate or simply share. *Assemble*, winners of the 2015 Turner Prize, is a London-based architectural collective who work across the fields of art, design and architecture [1]. The collective was invited by the Community Land Trust to translate residents' vision into drawings and models, which were then actualised. The result: what was once a group of houses in a community that had been 'ground down, ignored and disenfranchised over the years' is refurbished to 'celebrate the idiosyncrasies of the existing derelict buildings' [2].

Closer to home, *Superhero Me* has been working with disadvantaged communities to empower children through inclusive programme design and advocacy. Through the little 'artists in residence' programmes, caregiver talks, and mentorship, Superhero Me is shaping the narrative of inclusion in Singapore by providing a platform for social mixing [3].

Global inspirations

THOUGHT STARTERS

- How can we use audiences' interests in social causes to drive engagement with the arts?
- How can we work with artists to shape novel forms of interactivity and social practice art?
- How can we work with artists to not just provoke and raise awareness of social issues, but to also drive tangible behavioural change?



Aesthetics meets activism: Artists at the forefront of change [1]

Mary Mattingly's *Swale* (2016), a floating garden in the middle of New York City's Bronx River, is a forest of edible plants on the water [2]. After discovering it is illegal to forage or even grow food in public parks in New York City, Mattingly conceived an artwork to circumvent those laws and let people gather food for free. Continuing the tradition of artists such as Robert Smithson, Mattingly declares "*Swale* is a call to action," asking audiences to "reconsider our food systems, to confirm our belief in food as a human right, and to pave pathways to create public food in public space" [3]. As a direct result of *Swale* and the support of community groups, the New York City Parks Department opened its first land-based pilot in 2017 – a public 'Foodway' at Concrete Plant Park in the Bronx.

[1] Artsy (2020) [These 10 Artists are Making Urgent Work About the Environment](#)

[2] Art in America (2016) [Movable Feast: Mary Mattingly's Floating Garden](#)

[3] Swale NYC (2021) [About Swale](#)

Global inspirations

THOUGHT STARTERS

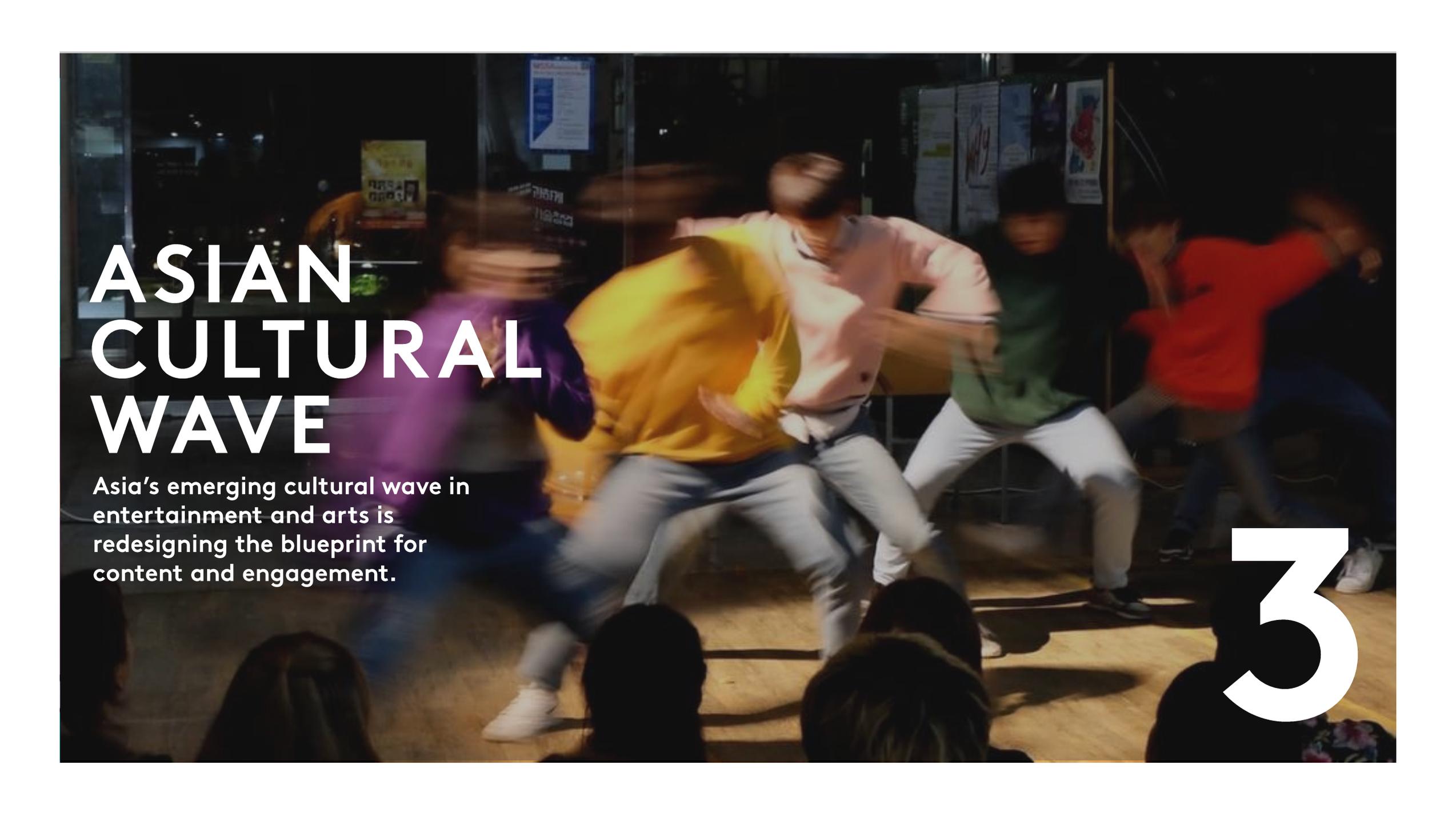
- What kinds of global issues can we anticipate in the next 3–5 years that might surface in artists' exploration?
- How can we tap into audience desires to find solidarity to fuel participation in the arts?
- How can we leverage certain art forms to become agents of change for social causes (e.g. climate change)?

Eco-awareness: Arts for Climate Change and the Anthropocene

Aria is a 'promenade experience' woven with vocal performances by the Hong Kong Children's choir, ethereal light projections on water, immersive installations, and dance. Conceived originally by economist and composer Dr Eugene Birman, *Aria*, through its site-specific installation, is an "attempt to enhance everyone's perception of air". As audiences walk through the night time conservatory, they experience a rare cooling effect created by the trees – a sensation not commonly felt in Hong Kong. Inspired by the Anthropocene, the songs are composed to compare public views on air pollution with scientific findings through big data analyses. At its heart, audiences are invited to 'empathise with Air'. Through its sensorial environment, *Aria* hopes to inspire audiences on greater eco-awareness, to realise that "Air can still get hurt by what people do, and needs the world to be kind" [1].



[1] New Vision Festival (2020) [Aria](#)



ASIAN CULTURAL WAVE

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

3

The underlying driving force

Increased travelling in and out of Asia (pre-COVID) has helped to drive the export and sharing of Asian culture.

South Korea's soft power through media and culture has accelerated over the past decade, influencing Chinese media and tech giants to replicate their success.

Ambitious and optimistic about global markets, Chinese media companies have been investing heavily in Asian content for export.

49%

Increase in overall traffic from India on Viki, a Korean drama dominant platform since COVID-19 [1]

400 million

US dollars of exported content by the Chinese TV and film industry in 2017. This comprises over 60% of all exported TV programmes, reaching >200 countries and regions [2]



[1] The Economic Times (2020) *How K-pop and Korean Drama had their Biggest Breakthrough in India Amid the Pandemic*
[2] McKinsey Global Institute (2019) *China and the World*

Changes with COVID-19

Even before COVID-19, players in South Korea and China have been quicker than their western counterparts in pivoting towards digital engagement. The multi-faceted aspect of existing Digital Service Platforms (DSPs) gives audiences a variety of options for livestreaming video, multiple payment systems, tipping, and a two-way social communication with artists. This also creates opportunities for artists to create new hybrid performance forms: a mix of music streaming, artist-fan chat, and live performance. Through DSP platforms, artists can also potentially introduce nuanced payment systems, such as 'entrance fees', tipping, and branded artist skins – making it possible for them to grow through new and innovative income streams.

Korean pop band BTS
pioneers virtual concerts

Expanding global reach

"To watch BangBangCon The Live by #BTS, Total 756,600 people from 107 countries connected to the Live show at the same time. This is the same scale of 15 times of 50,000 seats capacity stadium concert. This is the biggest size of the on-line paid concert in the world."

- Online comment from fans on BTS's concert [1]

Ensuring audience engagement

"They definitely spared no expense in creating visually stunning sets like their ARMY Bomb wall or the revolving stage that was sectioned out into three different sets for the unit performances, which saw the members split into different groups for their respective unit songs."

- Online comment on BTS's first online concert [1]

How this trend will sustain post pandemic

As digital technologies become more integral to Asian media, the region will play an increasingly dominant role in shaping new art forms, content, interactivity, audience engagement, and defining what audiences are willing to pay for. Post-pandemic, as travel resumes, Asia will likely be a port of call that will encourage greater cultural exchange.

For Asian audiences, the lines between 'local' and 'global' content are blurring as streaming companies look to localisation experts to adapt content for local tastes.

With content becoming both local and global, arts offering a holistic blend of local cultural aspects – e.g. from food, fashion, cool, *kawaii* – will have higher likelihood of flourishing.



Global inspirations

THOUGHT STARTERS

- Are there certain cultural symbols and lifestyle differences which give Singapore arts a competitive advantage in becoming localised and globalised?
- Given our geographical and cultural proximity to the rest of Asia, how can we shape the narrative of content to engage audiences?

Streaming content: Asian pop culture and slice of life

Japanese subcultures and video games introduced the world to anime, manga, characters such as Sonic the Hedgehog, Super Mario and emojis. Meanwhile, the Internet has made it possible for everyone around the world to access and share a common symbology, a common visual and dramatic language. Asia's notable preference for 'slice of life' content has led companies like Netflix to sign 'production line deals' with local TV Networks such as Fuji Television Network. Even reality TV shows such as *Bling Empire*, featuring a group of real-life wealthy Asians living in Los Angeles – have become an unexpected sleeper hit across Asia, and all around the world ^[1].



[1] Hashtaglegend (2021) *Bling Empire: The Latest Updates from the Crazy Rich Cast*

Global inspirations



Leveraging platforms and technologies

Since COVID-19, *NetEase Cloud Music* in China has launched a series of initiatives around live performances, including hosting 100 'high-quality live music shows' on its service. According to NetEase, up to 7,000 musicians have applied to take part in its 'Bedroom Live Music Festival', which has so far seen nearly 100 artists perform from their bedrooms to 16 million people [1].

Japanese livestreaming app *SHOWROOM* allows users to not only livestream performances by idols, voice actors and anime characters, it also allows users to exchange gifts with their favourite talent, which ultimately become the performers' incomes [2].

THOUGHT STARTERS

- How can we make use of new technologies to bring artists not just 'online' but into a 'digital world'?
- How can we leverage existing platforms (e.g. super-apps, Digital Service Platforms) to imagine new ways of engaging with audiences and creating novel streams of income in the next 3-5 years?

[1] Financial Times (2020) *NetEase Cloud Music Concert by TFBOYS Breaks Guinness World Records for Most Viewed Paid Concert*
[2] Freshtrax (2019) *What is SHOWROOM, #1 Live Streaming App in Japan*

Global inspirations



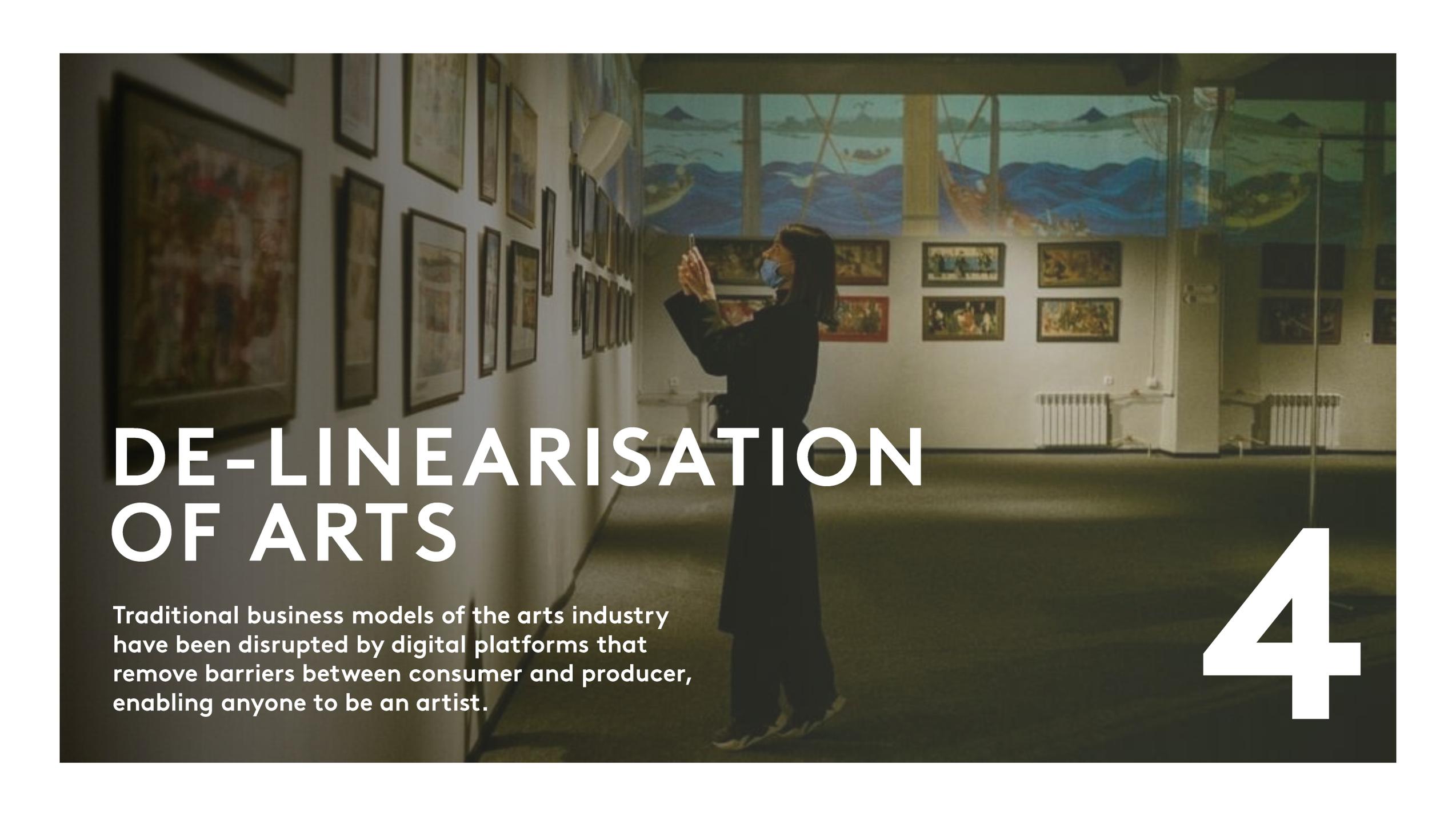
THOUGHT STARTERS

- How can we empower artists to explore issues that are not only relevant to their local context, but also universally applicable to a global audience?
- How can we shape Singaporean arts to present local narratives in a manner that is true to its context yet captivating on an international scale?

When Asian arts addresses issues of universal significance

With recent Asian films like *Parasite* [1] and *A Sun* [2] garnering critical acclaim, not just in Asia but all across the globe, Asian cinema is becoming increasingly accessible to the everyday cinema-goer. Such films are no longer seen as indie, inaccessible 'foreign-language' category films, but have become key works in mainstream pop culture. They not only manage to tug at heartstrings and offer commentary on social issues common to all – socio-economic inequality, family ties and strains – they also offer a glimpse into day-to-day Asian life for those in other parts of the world.

[1] IMDb (2021) [Parasite](#)
[2] Wikipedia (2020) [A Sun](#)

A woman in a dark coat and blue face mask is standing in an art gallery, holding up her phone to take a photo of a large mural on the wall. The mural depicts a seascape with a boat and mountains. The gallery walls are lined with various framed artworks. The scene is dimly lit, with spotlights highlighting the art.

DE-LINEARISATION OF ARTS

Traditional business models of the arts industry have been disrupted by digital platforms that remove barriers between consumer and producer, enabling anyone to be an artist.

4

The underlying driving force

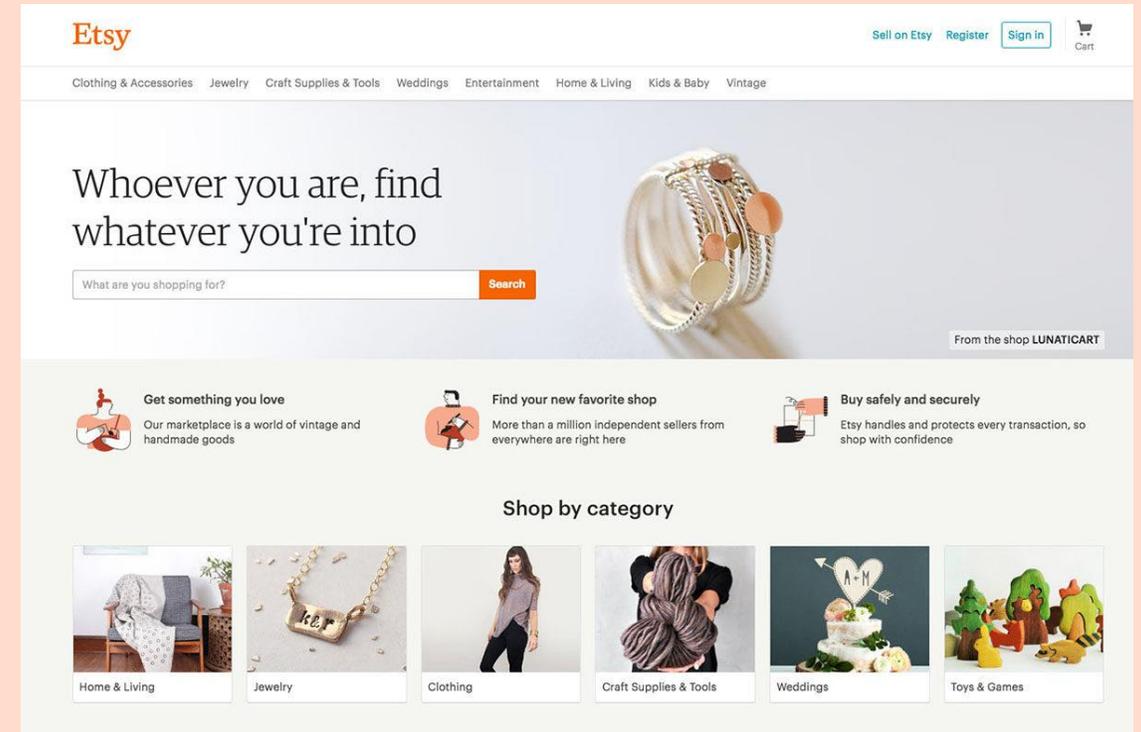
The emergence of direct-to-consumer platforms has complemented the growing desire for authorship through independent means.

78%

of global consumers say that 'relying on myself and my own resources' is 'extremely important' or 'very important' to them as a personal value ^[1]

45%

of global consumers say that it is 'extremely important' or 'very important' to 'create and share with the world something that is uniquely mine' (vs. 40% in 2019) ^[1]



Etsy, a marketplace for independent artists

Direct platforms like *Etsy* are allowing artists to showcase their work and sell directly without going through galleries and auction houses. In 2014, online art sales topped \$3.5 billion ^[2].

Global online art sales amounted to approximately \$4.82 billion in 2019, up by 4% over the previous year. Online art sales are forecast to increase to a total of \$9.32 billion by 2024 ^[3].

Digital arts collections are able to bring works of independent artists to more people than physical galleries.

[1] Kantar (2020) *Kantar Global MONITOR*

[2] Artdex blog (2020) *All For Art and Art For All*

[3] Statista (2020) *Estimated Value of the Online Art Market Worldwide from 2013 to 2024*

Changes with COVID-19

As the arts market shifts online, artists – particularly self-taught amateurs – are thriving without the middle-man.

Selling arts independently through social media has allowed artists to continue doing what they love

“While auction sales overall were down 58.3% the first half of the year compared to 2019, the smallest decrease came at works that cost \$10,000 and under. Many online art sales, particularly on Instagram, are on the low end of even that spectrum.”

- Artnet Intelligence Report [1]

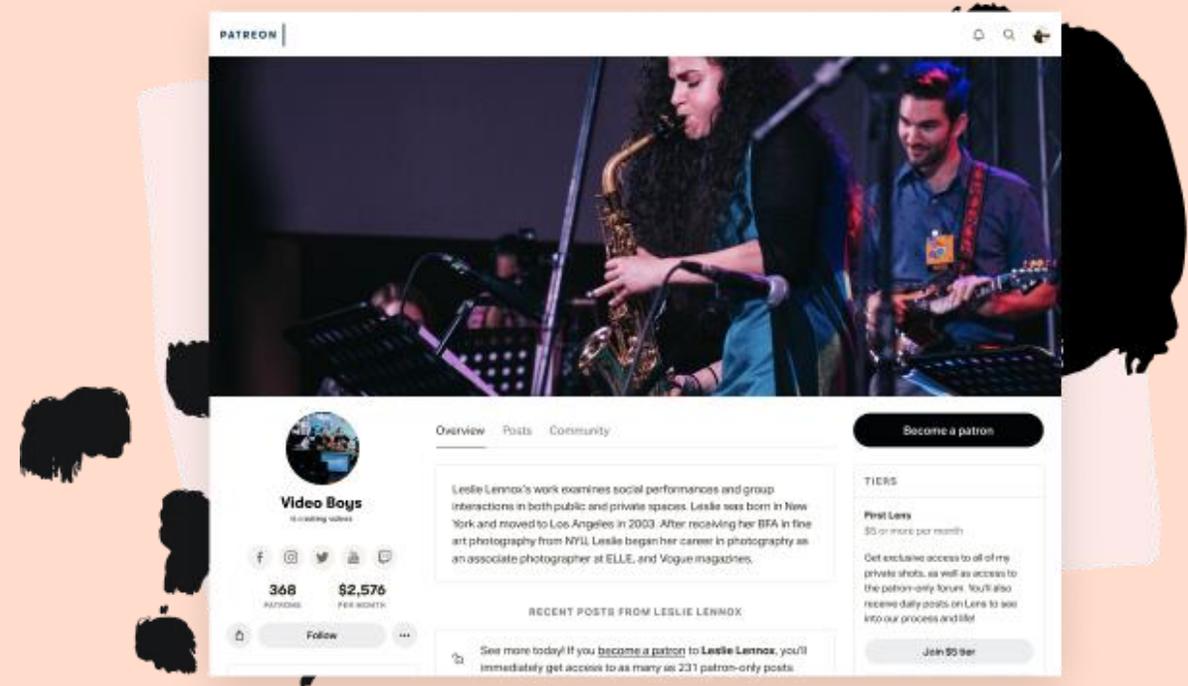
More than

1,300

#MADEINSG listings made through an initiative between Singapore Brand Office and Carousell, which provided a platform for freelance artists to engage directly with consumers and sell their creative works and services in order to support their livelihood [2]

150%

Increase in the number of musicians who have launched on Patreon during the first half of 2020, offering direct and exclusive content [3]



[1] Artnet News (2020) *The Future of the Art World Is Direct-to-Consumer*

[2] The Straits Times (2020) *Arts Community and Home-grown Businesses Rally to Help Freelancers Hit by COVID-19 with Commissions, Grants*

[3] Patreon (2021) *Musicians on Tour*; Music Business Worldwide (2020) *Over 70,000 New Creators have Signed Up to Patreon*

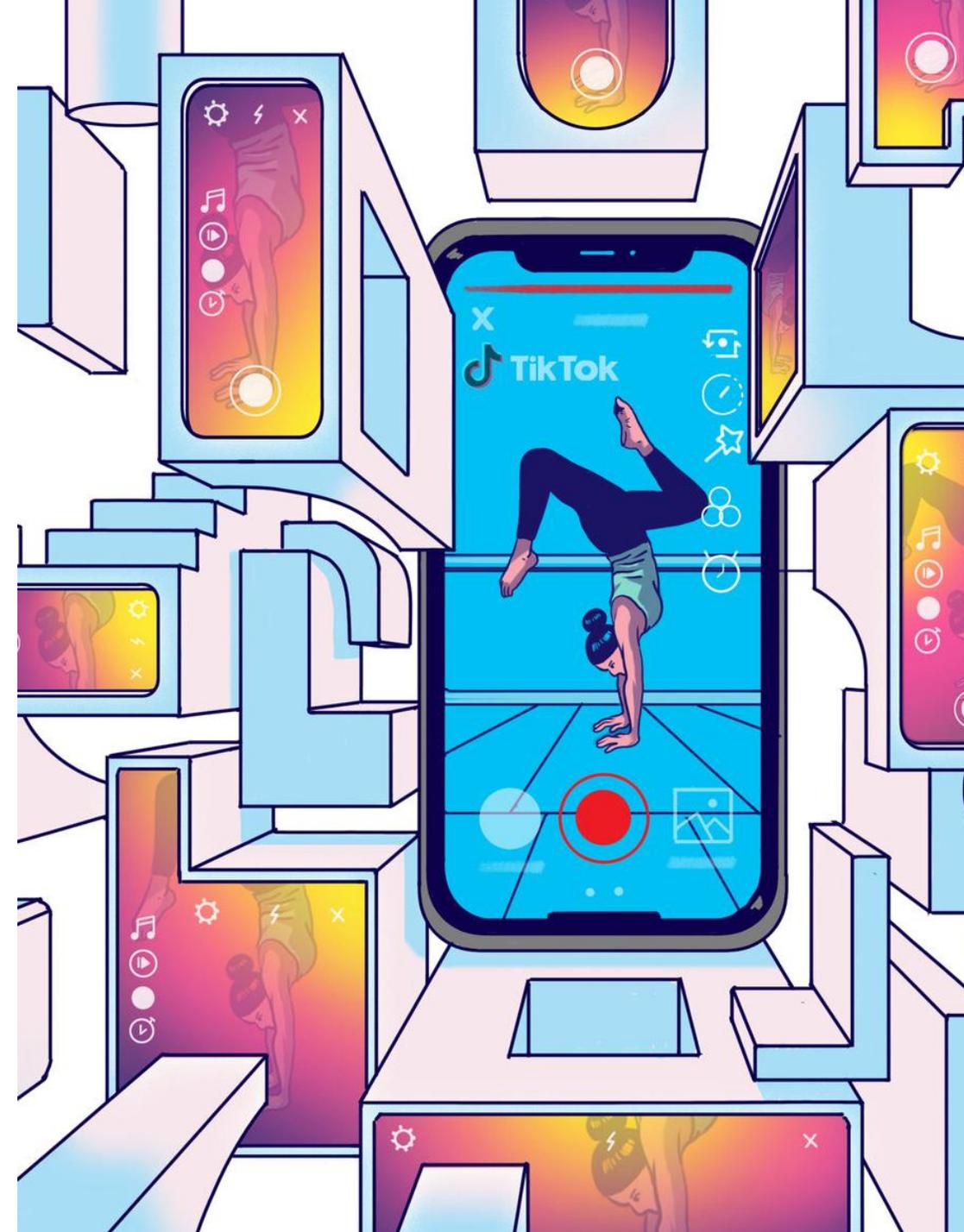
How this trend will sustain post pandemic

Direct models will remain popular with established and aspiring artists alike; giving artists more control over their content and eliminating the industry's gatekeeping – allowing arts to be defined by the creators themselves.

Leading new creation in music expression

In 2021, TikTok announced a global alliance with Universal Music Group (UMG) to inspire a new evolving music-centred culture where TikTok users can experiment and soundtrack their video creation from UMG's full catalogue of music [1]

[1] The New York Times (2020) *TikTok Clone*



200%

Increase in Google searches for 'TikTok' in Singapore since Circuit Breaker started in March 2020, peaking in August 2020. TikTok challenges initiated by various organisations have helped drive the platform's popularity [1]

TikTok has cultivated a community where self expression is now synonymous with content creation, a platform where anyone can be a dancer and showcase their creativity [2].



@Jalaiahharmon

14-year-old Jalaiah Harmon created her own dance to accompany the song 'Renegade' that became one of the most viral dances and catapulted her to TikTok fame. From performing at NBA All Stars, to choreographing and starring in music videos, Jalaiah transformed from being a typical girl-next-door to one of the TikTok world's most loved content creators [3].

[1] NAC (2021) *COVID-19 Arts Consumption Study* (data from R3, 9 Nov 2020 – 4 Jan 2021)

[2] Universal Music (2021) *TikTok and Universal Music Group Announces Expanded Global Alliance*; BBC (2020) *How TikTok Changed the World in 2020*

[3] The New York Times (2020) *The Original Renegade*

Global inspirations



[1] The Art Newspaper (2020) *Finding Room for Creativity on Zoom, eL Seed Creates a Collaborative Collage Online*

THOUGHT STARTERS

- How can we encourage broad-based collaborations using virtual platforms as spaces for self-expression and for artists to share their creations?
- How can we translate some of the intimacy elements of virtual platforms to physical interactions and events?

Virtual formats to drive co-creation

eL Seed is a French-Tunisian artist who primarily uses Arabic calligraphy to paint broad strokes of humanity's commonalities and push for unity and peace. Recently, eL Seed created a digital collage with his signature Arabic calligraphy by uniting 49 different people from all over the world as a symbol of unity using the online video chat platform, Zoom [1].

This self-driven initiative was aimed at inspiring artists to connect with alternative mediums and orchestrate new forms of art themselves.

Global inspirations

THOUGHT STARTERS

- What digital tools can we use to empower budding artists to realise their imaginative potential and encourage arts participation among the general population?
- How can we identify new partners and tools to offer greater access to the arts for new segments and to inspire creation?
- How can we integrate the arts with the portfolio of other brands to tap into their popularity and expand the arts to new audiences?

[1] Cnet (2021) *Lego Vidiyo Hands-on: An AR-powered Music Video App With Scannable Minifigures*



Using music and augmented reality to encourage creative expression among children

Lego Vidiyo, a collaboration with Universal Music Group, introduced a line of new music-inspired minifigures that empowered kids to be their own creators of their own music videos [1]. By utilising augmented reality, users could scan their own Lego avatars and unlock special effect 'beatbits' on the music video-creating app. These user-generated videos can then be shared on moderated kid-safe social feeds. This technology-driven idea offered an entertaining and easy way for children to be in control of crafting their own music videos and even inspiring creativity at an early age.

Global inspirations

THOUGHT STARTERS

- What are the tools and formats that can encourage artists to find personalised ways to reach their audiences?
- How can we build templates and platforms that make marketing and branding much easier for artists?
- What art forms might be left behind in riding the digital momentum? How can we also help traditional art forms bridge the digital-physical divide?

Promoting new music and content made easy for artists

Spotify Promo Cards enable artists and podcasters to easily create their own shareable social media assets through personalised cards to promote their features, songs and albums [1]. The promo cards can be further customised to fit the artist's branding, while allowing them to take control of their own audience reach.

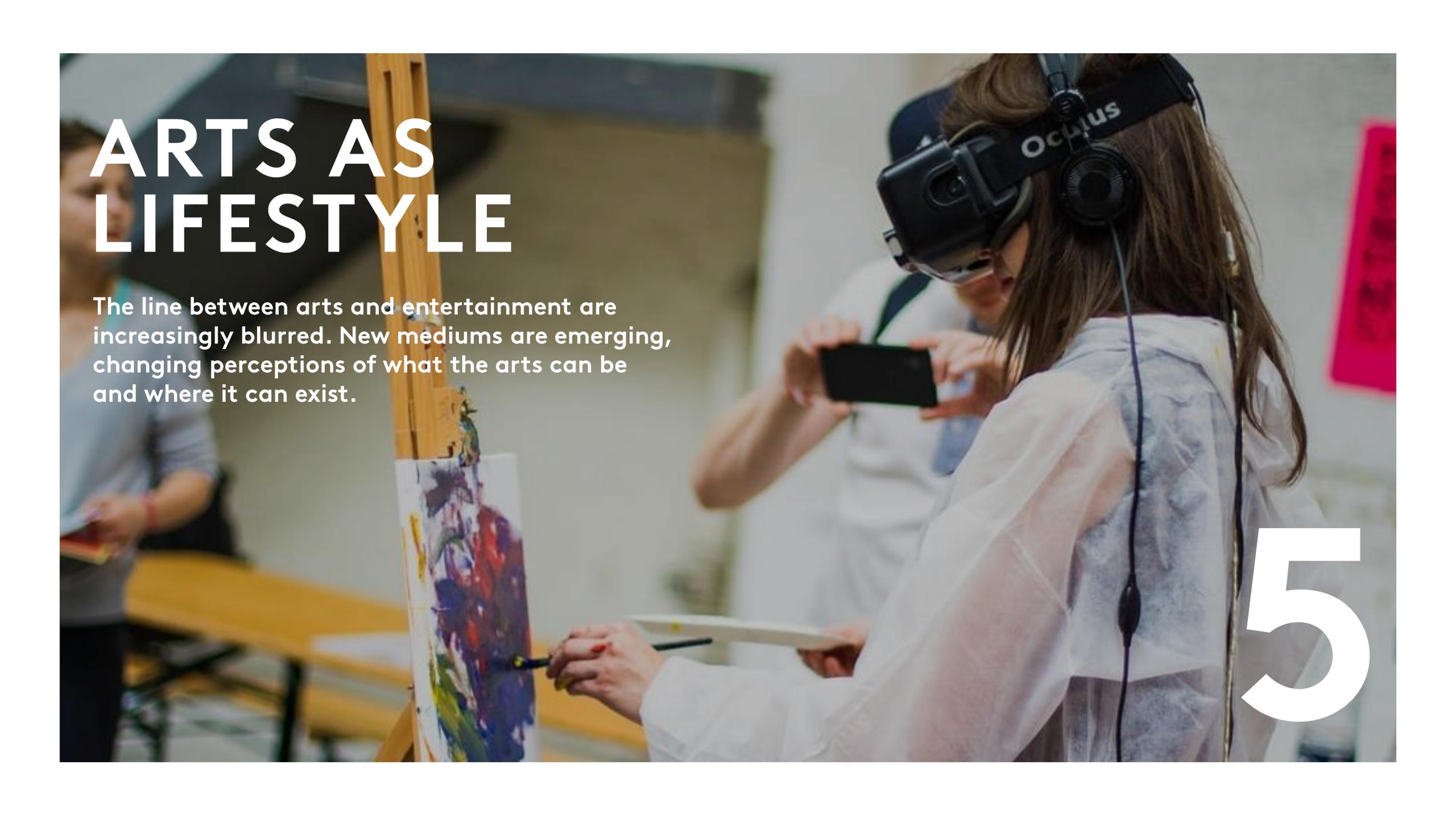
This new tool creates greater independence and seamlessness for the artist to market their content on social media directly to consumers.



[1] Spotify For Artists (2020) [Introducing Promo Cards](#); The Music Network (2020) [Spotify Launches Promo Cards to Introduce Artists and Podcasters](#)

ARTS AS LIFESTYLE

The line between arts and entertainment are increasingly blurred. New mediums are emerging, changing perceptions of what the arts can be and where it can exist.



5

The underlying driving force

As emerging technologies like VR/AR become more mainstream, consumers are warming up to virtual worlds as places to express themselves and interact with others.

[1] Singapore Business Review (2020) *AR, VR in Retail Sector to Persist in 2021*

[2] Kantar (2020) *Kantar Global MONITOR*

[3] Statista (2020) *Investment in AR/VR Tech Worldwide in 2024*

More than

70%

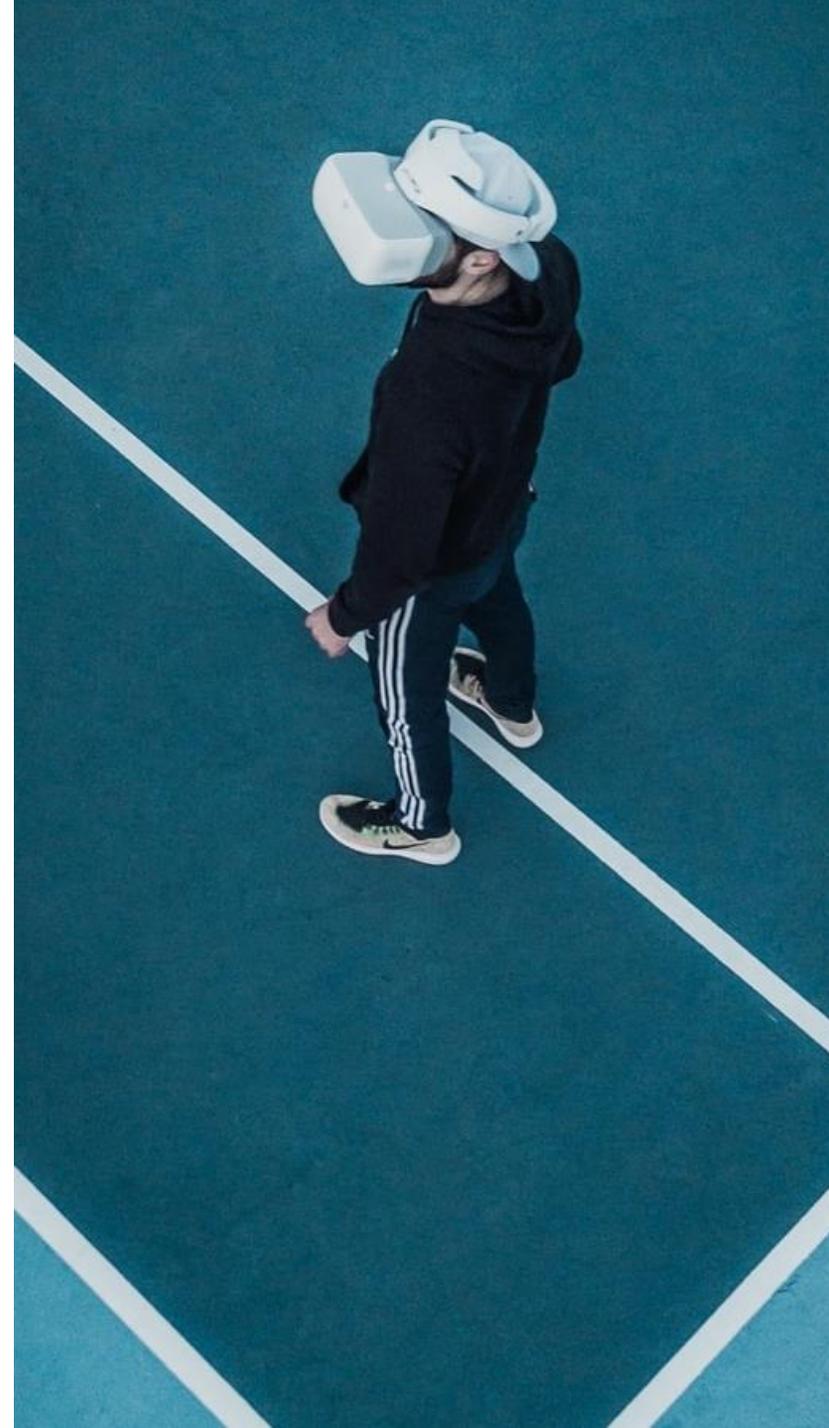
of Singapore consumers reported being more likely to purchase from a brand that focuses on immersive technology in the retail experience [1]

28%

of global consumers say that it is 'extremely' or 'very important' for them to do things and express themselves in virtual worlds, rather than physical ones (vs. 24% in 2019) [2]

\$17.6 billion

is the projected global investment in AR/VR gaming and VR video or feature viewing in 2024 [3]



Changes with COVID-19

COVID-19 has prompted the arts industry to reimagine the physical experience by experimenting with the boundless space that VR/AR technology offers.

Unreal City is an augmented reality art festival that can be viewed within one's home [1]. Using the Acute Art app, site-specific artworks can be placed in viewers' homes, giving people the opportunity to curate their own exhibition by works from KAWS, Nina Chanel Abney, Cao Fei, and more. This allows viewers to not just be a participant but a curator as well, where they can unleash their creativity by experimenting with how famous artworks can be blended within their home's interior design.



Fortnite, an online-multiplayer game hosted an in-game, live concert with American rapper Travis Scott. When the concert began, the entire in-game island turned into a stage, and players could run around the island while a giant avatar of Travis Scott performed for roughly 15 minutes. The concert was designed to be 'astronomical', where 12.3 million players were taken across different environments (underwater, on a rollercoaster, etc.) [2].

Travis Scott's concert grossed roughly \$20 million (including merchandise sales), and his songs drew 24.4 million streams on Spotify the day after the concert.

[1] Dazed (2021) *How to Enjoy Unreal City, London's Biggest AR Exhibition, from Home*

[2] Twitter (2020) *Inside Epic Games' Groundbreaking Launch of Fortnite Chapter 2;*

Billboard (2020) *Travis Scott's Streams & Sales Leap Following 'Fortnite' Virtual Concert;*

Forbes (2020) *How Hip-Hop Superstar Travis Scott has Become Corporate America's Brand Whisperer*

How this trend will sustain post pandemic

Art forms will no longer be siloed and will be continually redefined with greater cross-disciplinary and cross-industry collaboration, blurring the boundaries of where the arts can exist.

“Cross-disciplinary collaborations are vital in the emergent experiential sector...it’s now possible for our creative team to work closely with programmers, animators, robotics/mechatronics experts, musicians, choreographers and set designers to bring immersive experiences to new audiences at location-based experiences (LBEs) as well as before, during and post event with VR/AR/XR as well as digital platforms.”

- Robin McNicholas, Marshmallow Laser Feast [1]

[1] Nesta (2018) *Experimental Culture: A Horizon Scan for the Arts and Culture Sector*

[2] Pew Research (2013) *Arts Organizations and Digital Technologies*

[3] NielsenIQ (2019) *Augmented Retail: The New Consumer Reality*

[4] Variety (2021) *Sony Unveils ‘Immersive Reality’ Concert Experience With Madison Beer at CES*

77%

of US consumers agree that ‘the Internet has played a major role in broadening the boundaries of what is considered art’ [2]

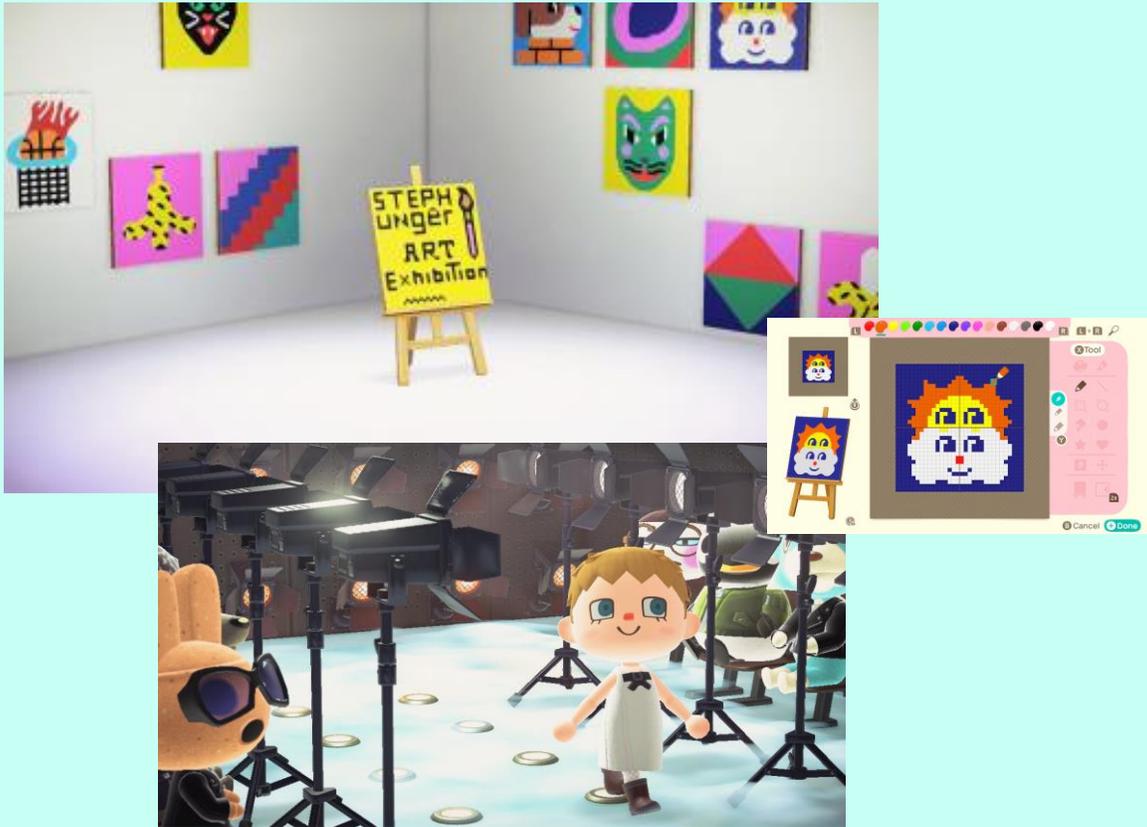
51%

of global consumers listed AR and VR as the top technologies they are seeking to assist them in their daily lives, which they are willing to use to assess product experiences [3]



Sony’s new technology uses immersive reality to redefine the concert experience for musicians and fans alike. At CES 2021, Sony launched a preview of the virtual concert with artist Madison Beer, which can be experienced with complementary immersive tech equipment like PlayStation VR and Oculus VR – disrupting how music will be engaged with and experienced [4].

Global inspirations



THOUGHT STARTERS

- How can everyday platforms, such as online games, be used as entry points into the arts for aspiring artists, and as creative platforms for existing artists?
- Could physical arts spaces be refreshed for the arts and broader interests to come together?

Games as a creative outlet for budding and established artists

Animal Crossing, Nintendo's life simulation video game has become a popular social space for both amateurs and professional artists alike to create and share original art designs. With the in-game 32x32 pixel editor capability, users can recreate well-known works of contemporary art, and virtually invite other users to take a digital stroll in their very own art studio or museum. Even fashion brands have now joined the platform to create a virtual fashion show to showcase new designs ^[1].

[1] Vogue (2020) *The World's First Animal Crossing Fashion Show Is Here*

Global inspirations

THOUGHT STARTERS

- How can we design virtual concerts to go beyond being a 'one-off novelty', to becoming a meaningful series to ensure continual audience engagement?
- How can we empower artists to embark on O2O-type explorations ^[1] to help audiences enjoy the arts in new and varied ways?



Sing a new tune through new and meaningful partnerships

In February 2021, *Pokémon and Post Malone* kicked-off P25 Music, a virtual concert series livestreamed on Pokémon's YouTube and Twitch accounts. Similar to Travis Scott's *Fortnite* concert that came before it, P25 Music brought Post Malone's avatar across different environments while performing his catalogue of songs. With Universal Music Group (UMG) as P25 Music's main partner, UMG's Katy Perry and J Balvin were also announced as upcoming acts for this series ^[2].

[1] O2O – offline to online experiences or interactions. For example, could buying a ticket to a physical concert also offer access to 'post-concert' virtual experience with new content or songs?

[2] Variety (2021) [Post Malone Pays Tribute to the Wide World of Pokémon in P25 Music Virtual Concert](#)
Slash Gear (2021) [Pokémon Day Just Made Post Malone into a 3D cartoon](#)

Global inspirations

THOUGHT STARTERS

- How can we use interactive mediums meaningfully to elevate how new generations engage with cultural arts?
- Could we use digital arts to draw audiences back to physical venues, such as using AR/VR to change how audiences interact with spaces?



Reinterpreting classic literary art through interactive media

It All Begins With a Word by Hong Kong artist, Hung Keung, re-examines old stories and poems through animation, video and interactive games [1]. Hung collaborated with animators, a dancer, a Cantonese opera master, interior designers, musicians and a video production team to bring his interpretations of Hong Kong's old literary arts to life. For instance, Hung used GIFs of moving artwork on Instagram to retell stories from the '50s and '60s in a more interactive manner.

[1] South China Morning Post (2020) [How Artist has Turned Forgotten Hong Kong Novels into New Digital Art and Online Experiences](#)

ARTS MADE ACCESSIBLE

How can we encourage artists to harness cutting edge technologies and allow the arts to evolve into more seamlessly hybridised forms?

How can we reframe digital arts for consumers and anticipate new forms of monetisation to help artists derive value from their work?

How can we promote digital arts and museums as richer and distinct experiences, rather than just recreating real-world equivalents?

Could we expand the breadth of activities in our arts venues to cater to a wider audience (e.g. cutting across art forms and modes of engagement)?

How can we encourage greater inclusivity, both from a content and channel perspective, for niche groups (e.g. persons with disabilities, migrant workers), which may also offer a novel experience for mainstream audiences?

What digital technologies could we leverage to expand the audience experience in physical spaces, engaging with senses beyond sight?

ARTS FOR A CAUSE

What are some of the social issues Singapore faces today and in the coming 3-5 years? How can we raise awareness and help address these through the arts?

How can we work together with multi-disciplinary artists to create inclusive spaces and practices to help disadvantaged communities?

How can we use audiences' interests in social causes to drive engagement with the arts?

How can we work with artists to shape novel forms of interactivity and social practice art?

How can we work with artists to not just provoke and raise awareness of social issues, but to also drive tangible behavioural change?

What kinds of global issues can we anticipate in the next 3 – 5 years that might surface in artists' exploration?

How can we tap into audience desires to find solidarity to fuel participation in the arts?

How can we leverage certain art forms to become agents of change for social causes (e.g. climate change?)

ASIAN CULTURAL WAVE

Are there certain cultural symbols and lifestyle differences which give Singapore arts a competitive advantage in becoming localised and globalised?

Given our geographical and cultural proximity to the rest of Asia, how can we shape the narrative of content to engage audiences?

How can we make use of new technologies to bring artists not just 'online' but into a 'digital world'?

How can we leverage existing platforms (e.g. super-apps, Digital Service Platforms) to imagine new ways of engaging with audiences and creating novel streams of income in the next 3-5 years?

How can we empower artists to explore issues that are not only relevant to their local context, but also universally applicable to a global audience?

How can we shape Singaporean arts to present local narratives in a manner that is true to its context yet captivating on an international scale?

DE-LINEARISATION OF ARTS

How can we encourage broad-based collaborations using virtual platforms as spaces for self-expression and for artists to share their creations?

How can we translate some of the intimacy elements of virtual platforms to physical interactions and events?

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ARTS AS LIFESTYLE

How can everyday platforms, such as online games, be used as entry points into the arts for aspiring artists, and as creative platforms for existing artists?

Could physical arts spaces be refreshed for the arts and broader interests to come together?

How can we design virtual concerts to go beyond being a 'one-off novelty', to becoming a meaningful series to ensure continual audience engagement?

How can we empower artists to embark on O2O-type explorations to help audiences enjoy the arts in new and varied ways?

How can we use interactive mediums meaningfully to elevate how new generations engage with cultural arts?

Could we use digital art to draw audiences back to physical venues, such as using AR/ VR to change how audiences interact with spaces?

Summary

Our process



1. MACRODYNAMICS SCAN

We begin by scanning through and analysing Kantar's proprietary macrodynamics database, a set of cultural, commercial and lifestyle-based trends we are observing around the world.

These are new or evolving dynamics of change, with the potential to grow and spread across markets in the future.

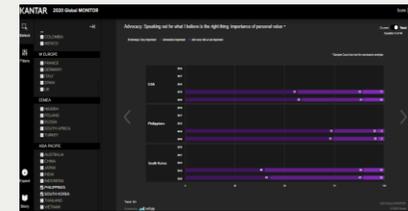
We put on our category-lens (in our case, the arts) to identify and hypothesise which of the global set of trends can be explored further in this study based on their relevance and impact to the arts industry.



2. EXPLORE BLINDSPOTS

Following the macrodynamics scan, we conduct a knowledge review of the following to ensure we cover any gaps in our research:

- Internal and external databases and reports including but not limited to Trendhunter, Kantar's streetscaping example database, Arts Council England, etc.
- Explore adjacent categories (e.g. media and entertainment) to identify early shifts or signals that would spill over into the arts.



3. VALIDATE & BUILD TRENDS

We then support and validate our five major trends with:

- Kantar Global MONITOR 2020 (Kantar Consulting division's annual study of changing consumer attitudes and values across 20+ markets and with foresight teams spread across Asia, EMEA and the Americas).
- NAC COVID-19 Arts Consumption Study (2021).
- Additional desktop research for arts-specific statistics and examples.



4. DISTIL PRIORITY AREAS

Finally, we identify what's next with:

- An Implications Session with NAC and partners from across the Singapore arts sector, focusing on sharing the five major trends and gathering inputs to our thought starters.

The resulting Playbook is co-created with inputs from those who work in the local arts scene.