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Festivals in South East Asia

Catalysts for the Creative Economy



Research Report
2022

Foreword by The British Council

Festivals are catalysts for creative, social, and economic development. Whilst playing an important role in driving local and national creative economies, festivals enable inclusive and sustainable growth for wider societal benefits.

Over the years, the British Council has acknowledged the multi-dimensional role that festivals play; from regenerating places, driving job creation, offering safe spaces for critical dialogues, as well as providing places for creative and cultural expression.

In February 2021, we commissioned the festival research as we noted a lack of evidence and data to demonstrate the socio-economic impact of the festival sector in the region. We wanted to learn more about the various festival typologies and the role they play within the sector itself, how they connect with communities, the contribution to a nation's creative economy as well as to find out how they connect internationally.

Alongside the UK's new dialogue partner status to ASEAN which was granted in early August 2021, we wanted to understand what the opportunities were for increased collaboration between Festivals in South East Asia and the UK. In addition, the International Year of Creative Economy for Sustainable Development (IYCE 2021) also marks an important milestone in the global creative economy agenda. The British Council is not only committed to supporting the aspirations for this auspicious year, but we would like to take this opportunity to put a spotlight on festivals and their contribution to the creative economy.

Beyond our own interest to study festivals, we hope this research can benefit a wide variety of audiences, from festival practitioners worldwide to national governments as well as the private sector. We hope this work will help enable festival practitioners to share, learn and inspire each other while continuing to demonstrate resilience and innovation during unprecedented times.

We need to also recognise that the data in this report reflects on a challenging situation generated by the COVID-19 crisis, which has pushed many festivals in the region to either postpone, cancel or close down completely. Some festivals may have managed to move their programmes online, yet many have continued to struggle with strict movement controls, new health regulations and unforeseen financial and wellbeing situations.

We wish to extend our thanks and appreciation to the festival practitioners in South East Asia who showed eagerness and generosity to provide input for this research. Lastly, we are grateful for the hard work and dedication of the brilliant team from Jogja Festivals and Tom Fleming Creative Consultancy who carried out this research with enthusiasm and sensitivity, navigating the difficult pandemic context seamlessly.



Foreword by Jogja Festivals

Festivals have become vital spaces of learning, connecting spaces, collaborative platforms, and drivers of innovative practice within the arts, cultural and wider creative sectors. In Southeast Asia where the democratic political system grew as part of its shared history of colonialism, festivals play their role to create an open society where a spirit of tolerance and acceptance of differences are always underlined. Thus, festivals foster freedom of expression, which in some instances finds itself under duress. Therefore, festivals are also important stages, crucial as civil society gestures of openness and courage.

Since the founding of the Jogja Festivals' network in 2014, discussions have honed on the importance of cultural festivals and their role in impacting various sectors and aspects in the society. The latest discussion includes how festivals are part and parcel of the creative economy, a sector that has been highly promoted by many governments as vital for inclusive, sustainable and innovation-led growth.

There is evidence that festivals are the driving force of the cultural sector and catalysts for social and economic development. However, many findings from different national and international festivals particularly in South East Asia, have not been well documented. It is important therefore to collect, document and present these findings in order to build and strengthen arguments towards the importance of supporting arts and culture festivals in the region.

This research seeks to uncover some answers to the reasons for holding festivals, especially in Indonesia as part of the South East Asian landscape. Involving 176 respondents, several reasons have emerged as to why festivals continue to be held, namely as an expression of cultural celebration, to showcase the latest innovations, a means to expand and create new social networks, maintain and animate the art ecosystem. It can also be said that the presence of festivals is directly and indirectly connected with people's need to produce culture and to carry out cultural exchanges with each other.

We would like to thank the British Council for the research grant given through the "Connection Through Culture" Programme to Jogja Festivals. This research executed by the Jogja Festivals Studies Center in collaboration with Tom Fleming Creative Consultancy from the UK and other researchers from Thailand, Singapore, and Vietnam has now been finalized under the title "Festivals Mapping in South East Asia". Our gratitude also goes to all festival practitioners in South East Asia who have actively participated in this research.

We hope our endeavour -with this research- will provide enlightenment for the future of festivals in South East Asia, especially in dealing with the COVID-19 pandemic, the various forms of mitigation festivals must be prepared for and managed in view of the transforming environment (natural environment, work environment, etc.) as to accentuate and underline the importance of festivals as a runway for future sustainable development.

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Chapter 1 Executive Summary

1.1 About this Research

The British Council together with the Jogja Festivals Study Centre joined forces to study the landscape and key players of festivals in Yogyakarta, Indonesia and South East Asia. Particularly for the South East Asian Region, this has become one scope to study due to the key role that the Indonesian government played in initiating the ASEAN Working Group of Creative Economy, the World Conference on Creative Economy and the fact that there are many international festivals.

In this research, Jogja Festivals is working with Tom Fleming Creative Consultancy (TFCC) which has conducted similar studies in other countries in South East Asia.

1.2 How Festivals Operate

There are notable ways in which Festivals in Asia operate. In terms of the genre and activities, there are more or less an equal number of generalist and specialist festivals. Generalist festivals usually elaborate more than one genre, which may include music, performances, fine-arts or other art related genres. Such a festival can harbour between one to up to 8 genres at the same time.

In terms of types of activities, there are festivals that operate in multiple as well as single activities.

Festivals elaborate matters of design, craft, arts, and cultural objects often in relation to a specific location, idea and/or cultural heritage, either as a singular focus or in conjunction of all these elements.

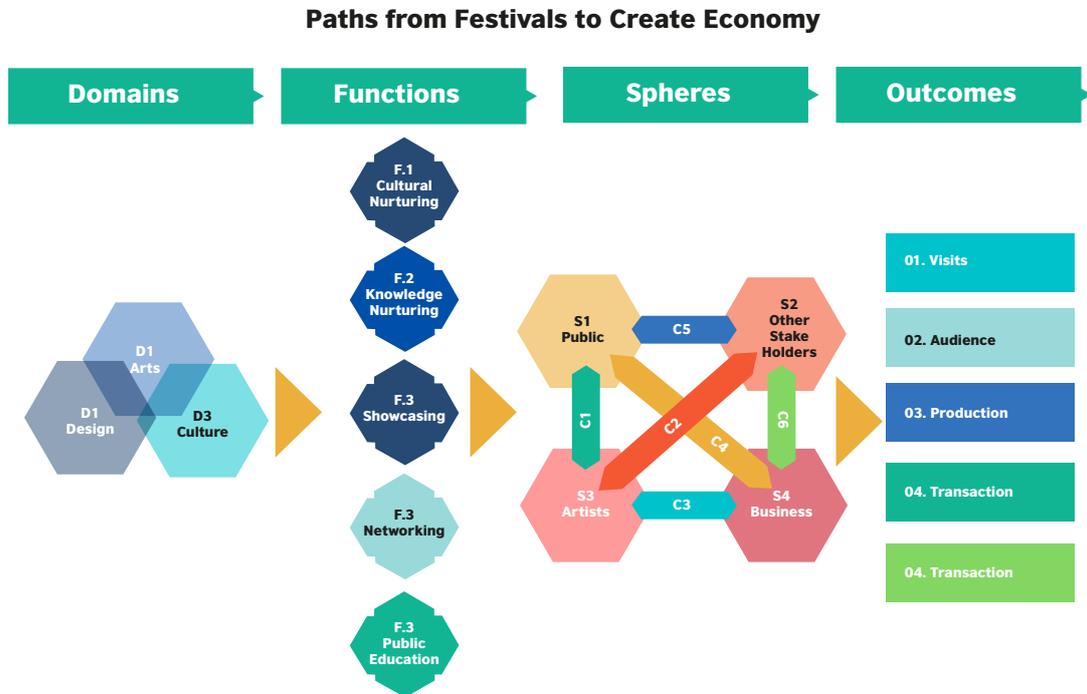
The following are two models or perspectives which map out the mechanisms. These models are constructed from the data of the questionnaires and case studies that illustrates the relationship of festivals to creative economies.

*Image Credit:
Singapore Night Festival*



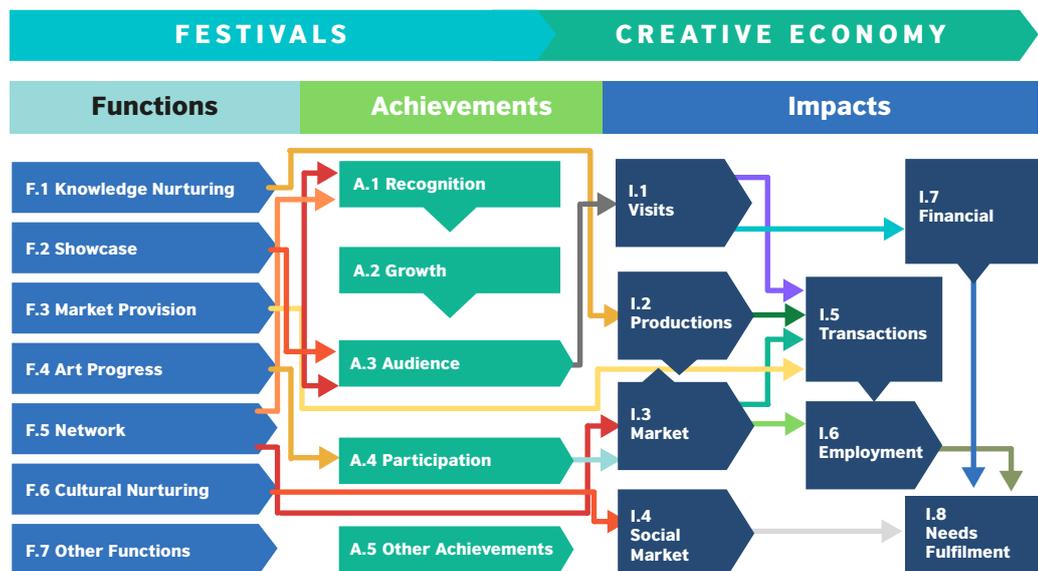
Model 1

This model describes the 4 paths that link festivals to the creative economy



Model 2

This model describes the mechanism from function of the festival, to what the festival had achieved, and to the impact to their surroundings.

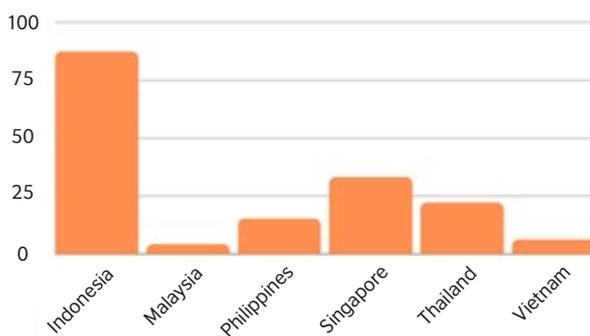


1.3 Festivals and Creative Economies

There are many paths of how festivals have impacted creative economies. One path shows that festivals generate public awareness and interest, as it does bring audiences. This in turn is followed by visits to the festival site. These visits increase secondary transactions (such as travels, lodging, etc.) and contribute to the economy.

In terms of relations with the government, some festivals are jointly organized by the government, civil society and industry. Other festivals are initiated by independent organizers, with strong support from the government. There are also festivals that are independently self-funding, with nearly no financial dependence on the government as well as corporations. Some festivals also have strong linkages with industries. One specifically stated expectation from the custom-made services festival to the government, for example, is that the government provides clear policies in the customization industry.

1.4 South East Asia and Country Level Respondents



1.5 Looking forward

Only a few festivals implicitly mention SDGs in their programmes or activities, yet many festivals are intensely and seriously elaborating concerns closely related to SDGs. Examples include festivals which highlight the thematic of rainforest, eco-tourism and inclusion.

Most festivals are heavily impacted by the Covid-19 pandemic. The situation has caused a severe turn for festivals, as the data shows. Most festivals rely on face-to-face audiences, presence in full physical settings. Initially only a few festivals reached out to online audiences. In most cases, festivals have been unable to change and implement new strategies to face the current pandemic limitations. Capacity enhancement of festivals to embrace this transformation to an all, or mostly, digital space is and will continue to be a major challenge.

Digital transformation and pandemic situations are two of the strong constraints in the present and future. It is recommended that the festivals explore and experiment in various strategies to adapt and to overcome these constraints.

Further, more specific studies can be conducted on specific paths of the relation between festivals and creative economies.

1.6 Recommendation

Core function development: Such as festival management capacity, production management capacity; business planning skills, leadership effectiveness and team capacity are on the top business development needs.

Support function development: These are needs such as organizational management, human resource management, and to boost marketing, promotion and data analytics skills.

Network Expansion: There needs to be more access to global networks and opportunities for involvement abroad. Strategic partnerships are important for festival sustainability and growth. This includes partnership with Government, education providers, the wider cultural sector (e.g. museums), and with enterprising private sectors.

Investment: The government can invest in festivals beyond tourism purposes. Festivals require investment which enables them to lead on programming, to commission new and often radical work. Thus festivals can become compelling platforms and catalysts for innovation and change in the creative economy.

Chapter 2 Research Background and Objectives

2.1 Background

Since the founding of Jogja Festivals network in 2014, discussions have honed on the importance of cultural festivals and their role in impacting various sectors and aspects in the society. Current discussions include how festivals are part and parcel of the creative economy, a sector that has been highly promoted by many governments as vital for inclusive, sustainable and innovation-led growth. There is growing evidence that festivals are the driving force of the cultural sector and catalysts for social and economic development. However, a lot of findings from different national and international festivals particularly in South East Asia, have not been well documented. It is therefore important to collect, document and present these findings to build and strengthen arguments on the importance of supporting arts and culture festivals in the region.

In relation to the aforementioned narratives, the British Council together with Jogja Festivals Study Centre joined forces to study the landscape and key players of festivals in Yogyakarta, Indonesia and South East Asia. Particularly for the South East Asian Region, this has become one scope of study due to the key role that the Indonesian government has played in initiating the ASEAN Working Group of Creative Economy, the World Conference on Creative Economy. There are a great many international festivals in existence, particularly in Yogyakarta, these festivals have brought about close networking between festival players in South East Asia.

Beyond the opportunity to network, festivals have become vital spaces of learning, connecting spaces, collaborative platforms, and drivers of innovative practice within the arts, cultural and wider creative sectors. In South East Asia, where democratic political system is part of the shared history of colonialism, festivals play

their role to create an open society where spirit of tolerance and openness to differences are always underlined, particularly where risks related to freedom of expression occur. Festivals have become an important and crucial platform to stage civil society's gestures of openness and courage from civil society.

There is no doubt that festivals across the South East Asia region are in need of development support in management and leadership skills, networks/international exposure, sustainable business models, and evaluation/research skills. Such support would enable festivals to better deliver on their potential. This study is conducted at a time when festivals are forced to evolve a hybrid format, where innovative thinking is needed at every element of a festival's organisation, from programming to showcasing platforms, from business models to building online audiences in the midst of the uncertainty due to the Covid-19 pandemic.

Jogja Festivals in close coordination with the government of Republic of Indonesia, particularly with the Ministry of Tourism and Creative Economy and the Ministry of Foreign Affairs, is initiating the creative economy discourse within the festival landscape of Indonesia and South East Asia. The UN year of creative economy, the UN SDGs timeline and the coming World Conference on Creative Economy in 2021 provide an opportunity to position festivals better as vectors for strategic development across the creative economy.

Image Credit:
JOGJAROCKARTA | Yogyakarta, Indonesia



2.1.1 Research Team

In this research, Jogja Festivals is working with Tom Fleming Creative Consultancy (TFCC) who has conducted similar studies in other countries in South East Asia.

a. Researchers

Indonesia : Felencia Hutabarat, Alia Swastika and Dinda Intan Pramesti

Malaysia, Vietnam and the Philippines : Tom Fleming and Nana Yu-i Lee

Singapore : Jeffrey Tan

Thailand : Prof. Ritirong Jiwakanon

Project Assistant : Anjali Nayenggita

Data Management : Saffanah Zahirah

b. Supporting Organisations

The three organisations working on this research are Jogja Festivals, Tom Fleming Creative Consultancy and the British Council. Together, the organisations designed this research. The research can be annually updated, and its methodology can be adopted by researchers who are planning to conduct similar studies in their respective city or country. The three organisations working on this research are Jogja Festivals, Tom Fleming Creative Consultancy and the British Council. Together, the organisations designed this research. The research can be annually updated, and its methodology can be adopted by researchers who are planning to conduct similar studies in their respective city or country.

• **Jogja Festivals** <https://jogjafestivals.com>

Jogja Festivals was founded by 15 national and international festivals on September 21, 2014, and was officially launched on March 9, 2017. The 15 festivals actively participating have contributed greatly towards a dynamic cultural movement in Indonesia. The organisation was established as a strategic platform for festivals in Yogyakarta and Indonesia. It focuses on strengthening the ecosystem of festivals and developing potential synergies. Since its founding, Jogja Festivals have actively contributed to the development of festivals which take on themes that highlight social, economic, infrastructure, education, arts and

culture issues. As the only strategic platform for the ecosystem of festivals in Indonesia, Jogja Festivals continues to learn and is open to various possibilities for future cooperation and collaborations which would place Yogyakarta as a world class festival city. In 2021, Jogja Festivals established the Jogja Festivals Study Center which initiated and led this research.

• **Tom Fleming Creative Consultancy**

<http://tfconsultancy.co.uk/>

TFCC is a leading international authority on the creative economy. Based in London, with associates across the world, including in Southeast Asia, TFCC has led research, evaluation, strategy and policy research in over 60 countries. This includes a National Strategy for the Cultural Industries in Vietnam, policy guidance and technical assistance to creative economy policy and mapping in The Philippines, a Creative Economy Blueprint for Kuala Lumpur in Malaysia, and deep-dive research on the creative economy in Indonesia. TFCC has recently evaluated the British Council's Festival Skills Programme, which included an overview of support offered to Jogja Festivals. In addition, TFCC evaluated the Connections Through Culture Programme for UK / China, led an international perception study on arts and culture in Singapore, and is currently leading a large-scale research project to map the cultural profiles of 60 cities across East Asia (inclusive of a focus on festivals).

• **British Council**

<https://www.britishcouncil.org>

The British Council is the UK's international organisation responsible for cultural relations and educational opportunities. British Council connects, builds understanding and trust between the UK and other countries through arts and culture, education, and the English language. Last year, the British Council communicated face-to-face with more than 80 million people, and over 791 million people online, through our radio and TV programs and their print publications. Founded in 1934, the British Council is a charity and public organisation that has become a legal entity with the Royal Charter. 15 percent of our revenue is covered by the UK government. Find out more: <https://www.britishcouncil.org>

2.1.2 Research Objectives

This research aims for the following:

- Building network capacity for festivals in South East Asia by mapping the festival landscape and key players.
- Documenting / modelling the range of festival platforms and typologies in South East Asia.
- Providing a way of looking at the relation between festivals and creative economy and how festivals are impactful for creative economy development. This includes how they relate to the creative economy policy and advocacy efforts in cities, countries or regions.
- Through new evidence, positioning festivals as a key tool in culture-led development, city making, innovation and creative economy in relation to SDGs.
- To document and present the challenges faced by the festivals in particular in the current pandemic and post-pandemic situation
- To document the existing relation between festivals in South East Asia and in the UK and to open discourse on future shared challenges and possibilities.

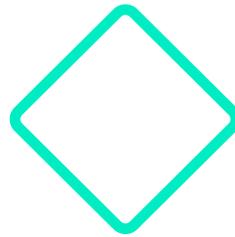


Image Credit:
KUSTOMFEST | Yogyakarta, Indonesia

2.1.3 Scope of Research

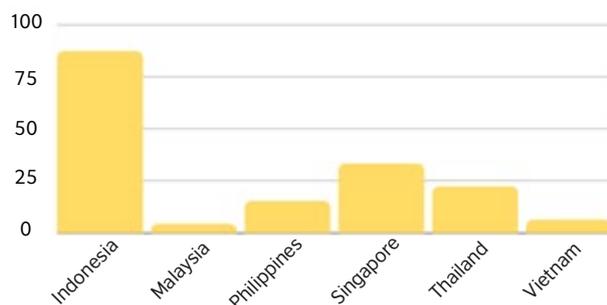
a. Geographical areas

The areas covered in this research is South East Asia, albeit limited to the following countries: Indonesia, Singapore, Malaysia, Thailand, Vietnam and Philippines, all are member states of ASEAN, with Indonesia as the main focus. 167 festivals responded to this survey.

b. Target respondent

The target respondents of this research are festival practitioners, local/municipalities and national governments, in each country. 60% of the main research is conducted in Indonesia and 40% is conducted in other countries. Gender balance is an important consideration in this research to highlight the important role of women in the fields of culture, art and the creative economy in South East Asia. The team also worked with data provided by the British Council offices in the respective countries. The data enables the research to map key festivals and access festival managers for case study development.

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c. Methodology

The research was conducted with the following methods:

- Desk-based research / mapping literatures, data gathering, interviews, etc.
- Development of a typology of festivals in Southeast Asia - to enable identification of most relevant festivals to the creative economy (to differentiate from religious and ritual based traditional festivals, plus to segment festivals between those which are tourism-focused and those which have a clear role in talent development and creative production.
- Targeted case studies per country, with additional focus on Indonesia, this includes a database of festivals with basic descriptions of what they are, art form focus, location, and approximate size.
- A simple survey disseminated to a broad range of festivals to capture descriptive data on a larger sample of festivals - to include location, art-form, model, time of year, age, and key challenges / opportunities.

d. Outcome

- A map of a sample of key festivals in the region, demonstrating the range and diversity of festivals by geography, art form and role in the creative economy
- A set of case studies which illustrate the role and impact of festivals and highlight future development opportunities
- An overview of survey results - describing key development challenges, opportunities and needs of the festival sector.
- A set of recommendations for festival development - to position festivals as key drivers of inclusive growth to the heart of the region's creative economy.

Chapter 3 The Role and Value of Festivals for the Creative Economy

3.1 Strategic context: Rise of the Creative Economy

The creative economy has become a global discourse for the past 20 years. It is considered as the new drive for economic growth and is adopted in policies by most of the countries in the world. UNCTAD Global Database on the Creative Economy presented a significant increase of international trade in creative sector goods and services in countries to a total record of US\$624 billion in 2011. It is expected to contribute to 10% of the global GDP in 2030. Many countries in all levels of development embrace the promising potential; not only those with strong cultural industries like in Europe or the United States of America, but also developing countries in Africa and Asia. In South East Asia, the creative economy has become an important part of each country's policy. Many nation member states have a national legal body or country strategy to further develop the creative sector. Some of them are: 1) Indonesia- The Indonesian Creative Economy Agency (2015); 2) Malaysia-Performance Management & Delivery Unit (PEMANDU) and Dasar Industri Kreatif Negara (DIKN, National Creative Industry. Policy - 2009); 3) Thailand - Creative Economy Agency (2018); and 4) Vietnam - Vietnam National Strategy for the Development of Cultural Industries to 2020, vision 2030.

Creative economy is also part of the ASEAN Economic Community discourse. It is implied in the ASEAN Economic Blueprint 2025, which mentions the development of supporting schemes for the creative sectors. The Indonesian government in particular, has been a keen promoter of the creative economy. In the past five years, the Indonesian government has been determined to make the creative economy the

backbone of its future economy and has been actively promoting the idea on the regional and global level. In 2019, Indonesia initiated and hosted the World Conference on Creative Economy Forum and Friends of Creative Economy Forum, actively involved in advocating for 2020 to be the International Year of Creative Economy and initiated the ASEAN Creative Economy Business Forum, to be held in November 2021, which would be the first regional mechanism on the creative economy.

In at least two countries in ASEAN, Indonesia and the Philippines, the creative economy has contributed more than 7% to their respective GDP. According to UNCTAD 2018 Creative Economy Outlook, Malaysia, Singapore and Thailand were among the main exporters of creative goods in South East Asia. This goes to show the existence of creative talents in the region and their continuous contribution in making creative and cultural products.

In view of the pandemic, it is important to mention that the creative economy sector is among the hardest hit. Creative workers were among the highest number unemployed, as many rely on public events and face to face interactions. The UNESCO 2021 on Cultural and Creative Industries in the face of Covid 19 reported that cultural and national heritage, also performance- and celebratory activities are the

*Image Credit:
Bedog Art Festival |
Yogyakarta, Indonesia*



two sectors most extremely disrupted, followed by cinemas and public library/ bookshops. Meanwhile, the pandemic has pushed digitalization of the creative sector, but with uneven internet connection, incompatibility of gadgets and the lack of digital knowledge, there is still a huge digital divide among creative economy workers, particularly those in the performing arts and those who live outside of the big cities.

3.2 Rise of Festivals

The creative economy has become a global discourse for the past 20 years. It is considered as the new drive for economic growth and is adopted in policies by most of the countries in the world. UNCTAD Global Database on the Creative Economy presented a significant increase of international trade in creative sector goods and services in countries to a total record of US\$624 billion in 2011. It is expected to contribute to 10% of the global GDP in 2030. Many countries in all levels of development embrace the promising potential; not only those with strong cultural industries like in Europe or the United States of America, but also developing countries in Africa and Asia.

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a. Traditional rites / rituals, often linked to religion or folklore. Tend to be locally driven and on key fixed dates / seasons. Vital to social and cultural identity. Some are being positioned for tourism. Traditional festivals which have been adapted as tourism products. They have some historic provenance but are hyped-up or commodified for incoming tourists (consumers).

b. Crowd-based festivals with contemporary programming of popular art forms, especially music. Influenced by the western 'Glastonbury' model – tend to be large scale productions aimed at urban millennials and tourists. They sometimes involve new commissioning. Part of a wider circuit of festivals. Professionally produced and commercial.

c. Sector-focused festivals to boost industry profile, facilitate networks, build audiences and support industry development. These include film, music, publishing, gaming, visual arts and design festivals with a 'meet' market and showcase element. These are usually place-based; some national or regional; most have some international element. Most showcase rather than commission new work.

d. Theme / issue – based festivals. These are usually cross-art-form and place-based. They play a convening and awareness-raising role. They also commission new work as well as showcase existing work. Themes and issues include environmental sustainability, LGBTQ, equality, and/or 'niche' communities of interest – e.g. food, sports, hobbies etc.

e. Place-based – e.g. city festival, rural arts festival etc. These are community-building events, often cross-art-form, with multiple strategic objectives, from building audiences for culture to civic pride; from bootstrapping cultural capacity to place-branding, inward investment and tourism.

3.3 Recognition of Festivals Festivals have a diverse spectrum of functions, such as:

3.3.1 Catalysts for story-telling and cultural identity

Festivals contribute highly to people's unity. They can reflect the origins of the celebrated people and reflect the cultural influences that formed their identity. There are place based festivals that are open to diverse people, in this research it is exemplified by the Escolta Block Party in Philippines, KABA festival in Indonesia.

3.3.2 Acts of collective memory and of changing traditions

In this role, festivals reflect on the shared memory, knowledge and experience of a particular group of people. Festivals contribute to celebrating, constructing and passing those memories to their visitors over the years. Festivals like Hoi An Full Moon Festival in Vietnam and Rainforest music festival in Malaysia are good representatives of this.

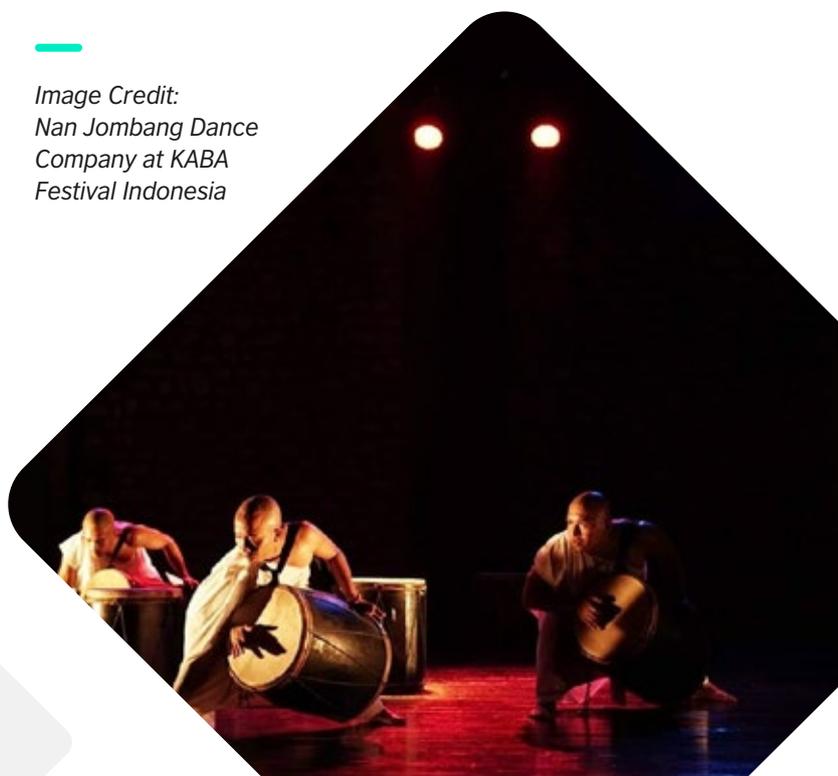
3.3.3 Platforms / spaces for talent development and creative expression

Modern day festivals may provide space for new creative expressions and to scout new talents. These festivals are often focused on starting or emerging talents, while also showcasing more mature talents as inspirations. Contemporary arts festivals act as open platforms for innovative works and ideas that would be difficult to express in traditional festivals.

3.3.4 Active place-makers – dynamic drivers of social and cultural development

Most festivals take place in the same location. This gives a sense of continuity, besides building the festival's identity. In certain cases, festivals are created to provide a space for the locals to express themselves and to overcome social challenges. Festivals like this are most often held in underdeveloped areas or currently abandoned areas/ They are generally held in order to revive these once thriving areas and to open its access to future opportunities. The Baguio creative cities festival in the Philippines, Refugee Festival in Malaysia are examples of this type of festivals.

*Image Credit:
Nan Jombang Dance
Company at KABA
Festival Indonesia*



3.3.5 Enablers of collaborative practice, R&D and innovation

There are a number of festivals that provide platforms for collaboration, rather than act only as a showcase. The programmes of such festivals may include open invitation for artists to work on collaborative projects, or to be connected with artists from different genres, cities or even countries. Such festivals are usually more open to new ideas and provide the artists freedom to work on their project. KUSTOMFEST festival, Vietnam Design Week are examples of this.

3.4 Impacts and Development

Roles of festivals in the South East Asian creative economy in this research are extracted from responses to the questionnaire, as well from case studies. The case studies of 27 festivals mentions 170 function statements of the festivals, 50 achievement statements, and 55 impact statements.

Festivals in the South East Asian region relate to the Creative Economy in diverse ways. Some festivals are actually a form of creative economy, in terms that they elaborate, produce in the sectors of Creative Economy. Fashion, craft, film festivals are examples of this, as they are directly intertwined with economic activities.

In Vietnam, festivals deal directly with the theme of design, while collaborating with creative industry actors. Kuala Lumpur Fashion Week in Malaysia directly interacts with the fashion industry. In Indonesia, Kustomfest interacts with the automotive industry, in the avenue of custom modification, thus facilitating festivals of custom modifications. Kustomfest had attracted some 30,000 visitors and received 10 million views on digital media. The festival, in terms of business, became an interaction forum for brands, engineering, brand research and development.

Some other festivals interact with the tourism industry, especially cultural tourism such as the rainforest music festivals and Thailand biennale, which convened in a beach resort town. The Danang Firework Festival attracted 1.5 million tourists in 2018. Thailand Biennale had generated 864 million baht of income and 321.31 million baht of taxes for Krabi, and created 3,994 jobs during the festival.

Other festivals connect to the Creative Economy through the elaboration of urban spaces and cultural heritage. Still others work on efforts on Safe Space and inclusion. Fringe Manila, Refugee Festival in Malaysia are some festival examples that have inclusion on their minds.



Image Credit:
Rain Forest Music Festival |
Malaysia

Chapter 4 Festival Landscape in Southeast Asia

4.1 The Role of Festivals in the Southeast Asia's Creative Economy

Festivals in South East Asia relate to the Creative Economy sector in diverse ways. Some festivals are directly linked to creative industries, sectors such as fashion, craft, films and are intertwined with economic activities. Festivals contribute significant platforms in building art ecosystems and infrastructure. Many festivals in South East Asian countries rely on activities and programmes initiated by art communities. rather than government initiatives.

While many South East Asian countries had established their national gallery and National Theatre or Performing Art Centres, there are still gaps between the direction of these institutions that stand as representations of “national identity” and the civil grass-roots movement. Festivals have played significant roles to bridge this lack of interconnection between public and government institutions, and have provided a platform to celebrate the richness of a country’s cultural diversity.

This research provides a closer look at the roles, impacts and challenges of various arts and culture festivals. in relation to the improvement of life of societies in their respective countries. At the same time, it elaborates on the use of urban spaces, and cultural heritage.

In the Philippines, creative hubs are viewed as safe spaces for creative expression and exchange, aside as being platforms for inclusive growth. The role of festivals here is to raise awareness of the artist's cultural sector in **building stronger communities and in fostering local pride and responsibility**. They are also critical connectors between grassroots cultural activities and the more commercial tendencies of the creative industry.

In Vietnam, festivals directly deal with the theme of design, collaborating directly with creative industry actors. Design hubs are mentioned as the avenue of interactions between festivals with creative economies which collaborate with government works. Support of young artists/arts students in presenting their works, besides **to build sustainable creative communities of artists and local people**.

With many urbanized locations, Malaysia Festivals had linked directly with the so-called creative hubs. These arrangements are closely knitted with **place-making, urban planning, and a new participative paradigm of thinking about the urban future**.

This includes involvement with government or government initiated programmes on creative economy, contemporary issues as well as cultural heritage preservation. Malaysia also mentioned developing a creative economy in the array of their aspirations.

In Indonesia, Kustomfest interacts with the automotive industry, in the avenue of custom modification, facilitating festivals of custom modifications. Kustomfest had attracted some 30,000 visitors, 10 million views on digital media. The festival, in terms of business, became **the interaction forum for brands, engineering, and brand research and development**.

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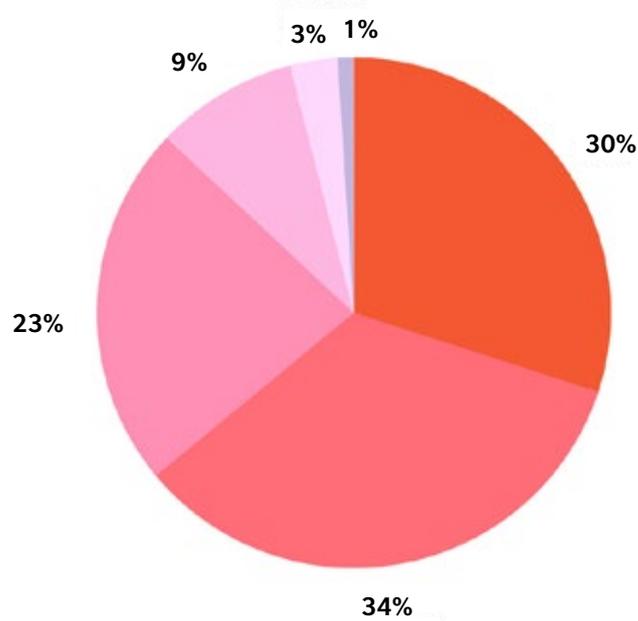
Image Credit:
Gallery of Children Biennale |
Singapore

4.2 Programmes and Activities

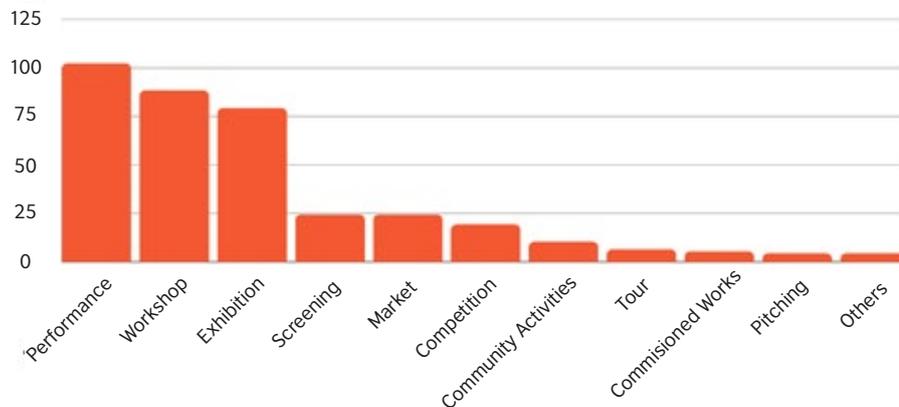
The festival's programmes in nature consists of both generalist and specialist correlating activities. Some festivals conduct one activity, while others conduct many activities. Considering that approximately 100 out of 140 festivals have only a few (1-3) activities, one finds a tendency of specialist festivals. The most varied activities of a single festival consists of six activities and this is represented by only 1 festival.

In terms of activity types, the distribution is as follows:

**Q8 Activities:
Single or Many Activities**



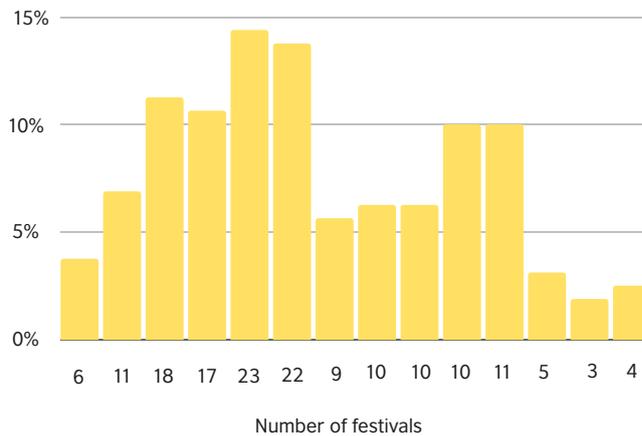
Activities Types



The largest portion of these activities are performance, workshop, and exhibitions.

Somewhat parallel to activities is the question of programme (Question number 10). This is a multiple choice question, where the respondent can check more than one option. Specialist and generalist aspects are as follows:

Program Specialist VS Generalist



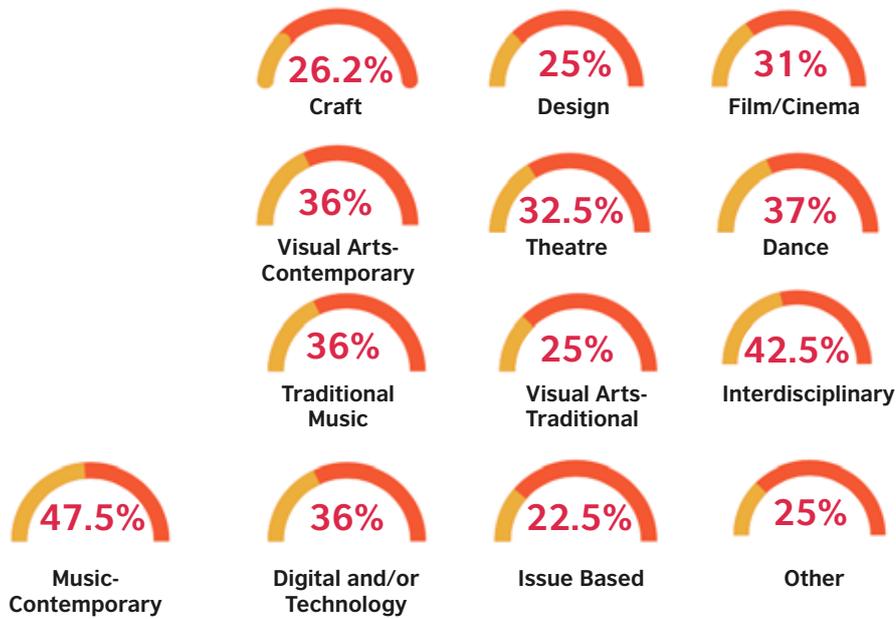
In terms program content, see data below:



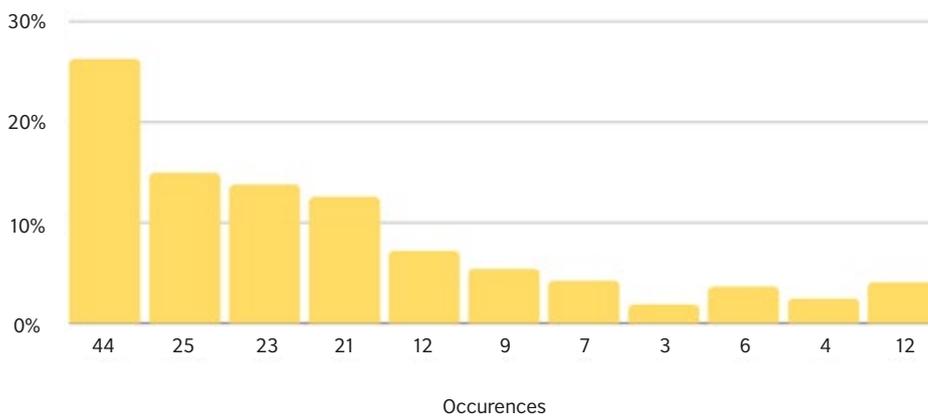
More sophisticated efforts to promote the quality or the advancement of the arts (such as tours, commissioned works, and pitching) are still rare. This might be the next attention for the already established festivals, although this might need greater resources. In general, the festival operates in multipronged activities to pursue their goals

4.3 Genre

Most festivals offer more than one specialist genres, covering between one to five genres, while a relatively smaller number of festivals present six to twelve genres.



Genre Specialization



The genres here are distributed rather evenly, without any one genre standing tall or thin compared to the other.

These statistics trigger the question whether festivals also act as a hub between forms of arts, and also whether the festival employs the tactics of using multiple art forms to gather people.



Image Credit:
KUSTOMFEST | Yogyakarta, Indonesia

Image Credit:
Biennale Jogja |
Yogyakarta, Indonesia



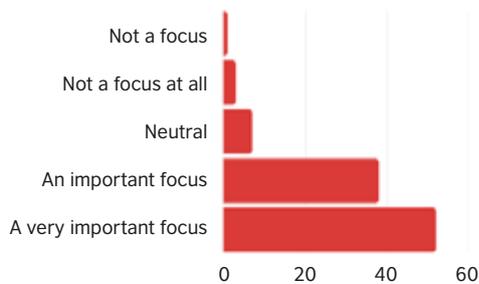
4.4 Themes

Festival driving themes include:

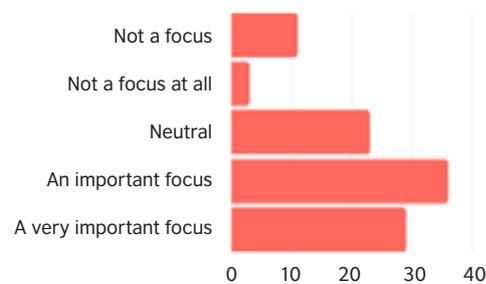
- Build Local pride, (51.52%)
- Grow the creative economy, 45.45%
- Grow cultural capacity, 42.42%
- Build tolerance and inclusion, 40.63%

additionally, festivals can also reflect the following:

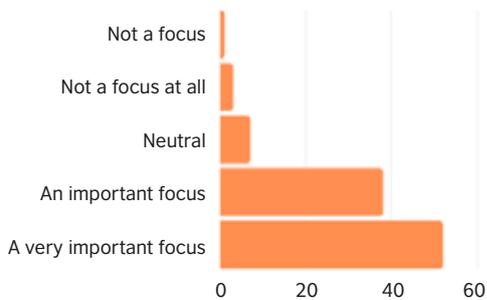
- Build environmental awareness, 37.50%
- Provide employment, drive innovation across the economy and provide opportunities for minority communities , 33.33%
- Grow and enhance tourism and attract inward investment, 31.25%



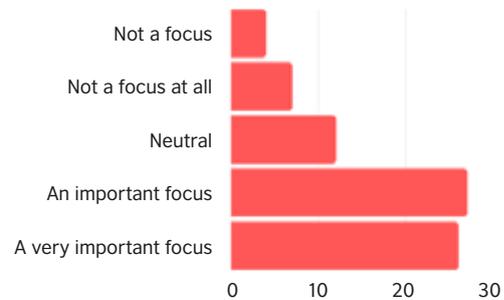
Build Local Pride



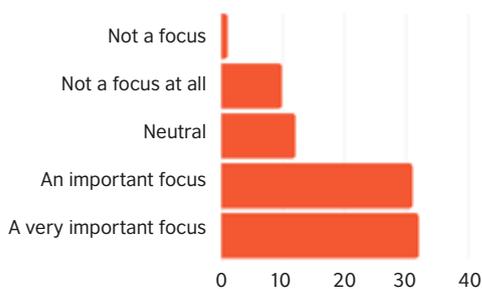
Grow & Enhance Tourism



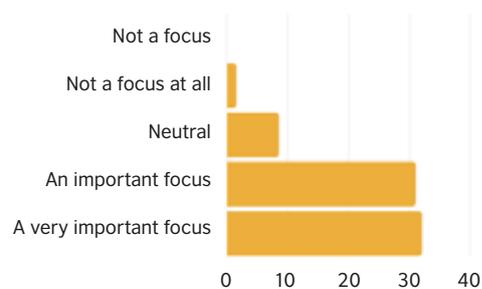
Build Local Pride



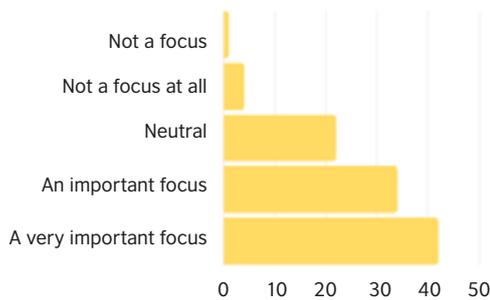
Atract Inward Investment



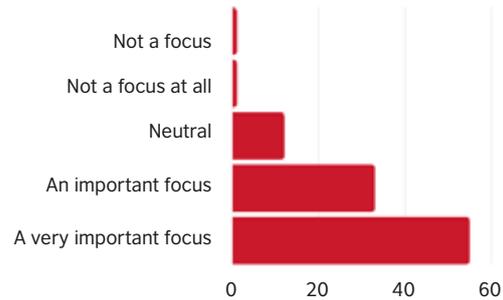
Drive Innovation Through Economy



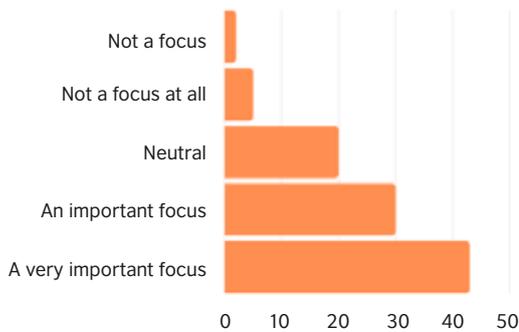
Grow The Creative Economy



Provide Opportunities for Minority Communities



Build Tolerance and Inclusion



Build Environmental Awareness

150 respondents described their activities; many of them work in specific art related fields. Of these 150 responses, 40 explicitly mentioned arts as the theme of their activities. Some were more specific mentioning the Arts, i.e. music (18), films (15), dance (9), theatre (9), literature (5), performing arts (4), sculpture (1), and traditional/folkloric arts.

Some, although still a small number, mentioned specific sectors outside of arts, such as craft, design, sports, heritage, city festivals, marketplace, automotive.

Some iterated hybrid activities that emphasized the moment, space and cultural spots and spirit, in which arts, the marketplace, and performances were held together.

In terms of activity numbers, the Arts still lead in opening the door to the creative economy. Yet, other sectors -although still small in number- can also be significant, including design fairs which directly involve large industries/brands.

4.5 Audience

While ethnic and religious diversity has been exposed broadly, this survey shows that the age range of participants and audiences for South East Asia Festivals rely heavily on young audiences (age of 21 to 35), this age group also reflects 80 percent of the respondents. This correlates to the location of many festivals, which according to the survey are usually held in urban settings where young people view attending festivals as part of a new lifestyle, a common pastime during their leisure.

Following in second place is the 35-50 age group. This group consists generally of a combination of audiences, who have a long attachment to the Arts or who want to introduce the Arts to their family. Some are professionals whose attendance of festivals are part of their main activities. There are a few festivals dedicated for young children, teenies below 20 years old and those over 50 years/. This finding gave insight that there are marginalised age groups in the festival scene. An example of efforts made to attract young audiences and visitors is the Children Art Biennale, organized by The National Gallery of Singapore. This Biennale wished to introduce art at an early age to their communities.



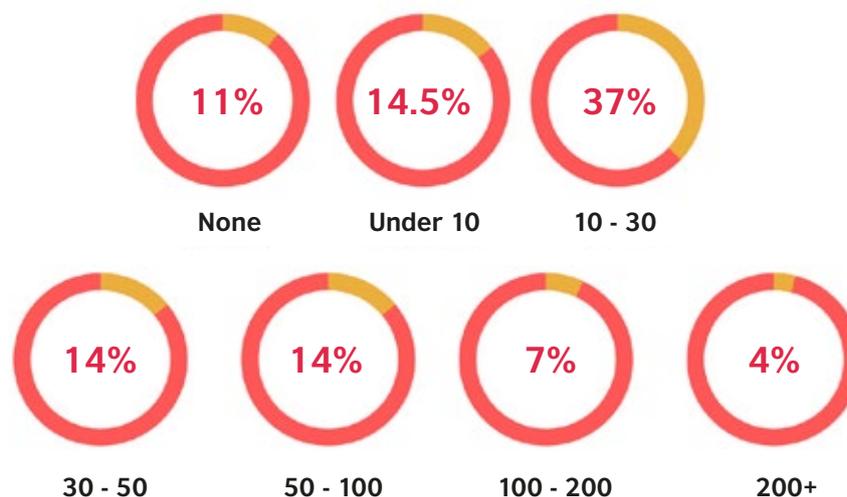
Image Credit:
ARTJOG | Yogyakarta, Indonesia



4.6 Festival Organisers

Apart from bringing the Arts closer to society, festivals induce the growth of the creative economy. It opens vacancies for those interested to work in the industry. Even with limited funding or resources, smaller scale festivals exist. They offer opportunities to young people to gain experience and learn more about creative economies and event management, thus festivals are also important educational platforms that sustain art and culture. Most festivals involve a very small team of 5 to 10 persons, working full time and more, while during the festivals many more volunteers are mobilized. In places like Yogyakarta, for example, it is interesting to see how volunteering or working part-time for events/festivals has helped younger artists or managers to survive economically. Some very big events like city festivals or biennales usually have more than 100 volunteers since occasionally the festivals take place in several venues, for quite a long period of time.

How Many Volunteers Do You Have?



4.7 Inclusion

Another important aspect of festivals is its ability to bring people together to celebrate life and their identity. Thus it is very obvious for many festivals to show their perspectives on diversity, inclusivity and multiculturalism. As mentioned in the introduction, the given situation of multicultural Asia had encouraged festival organisers to find ways in involving audiences and talents from various backgrounds, to break the boundaries of majorities and minorities. Places like Singapore, Kuala Lumpur, Jakarta, Bangkok and other so called cosmopolitan cities, the idea of multiculturalism refers to reaching out to people from various backgrounds—race, ethnicity and religions, the festivals bring together their values, cultural richness and diversity, as well as tradition and contemporary situations.

How Much Does Your Festival Prioritise Inclusivity & Diversity

Among Performers & Creative talents



Among Members & The Organising Team



69

Festivals are seen as beacons for inclusive and equitable cultural development and thus as platforms for a progressive creative economy based on all the talents.

Tom Fleming, in notes on festivals in Vietnam, Philippines and Malaysia

Meanwhile, some communities in South East Asian countries have shown resistance towards controlled circumstances for quite a long period of time and used the festivals to raise their local tradition and strengthen their own historical identity. In the last few years, local governments also started to see the importance of supporting and collaborating with community organisers to create open, inclusive and local-based festivals in appreciation of cultures and traditions and to broader connect, instead of seeing festivals merely as ceremonial. There are a large number of community festival organisers that use festivals not only to celebrate local cultures and values, instead they go beyond celebration and apply much effort in advocating local issues, or to preserve hidden history and knowledge. This seems very much related to engagement of artists and cultural activists to social political problems.

With their vision of celebrating locality and raising a stronger sense of belonging to local identity, many festival organisers proudly admit that 80 percent of their audience are local. Some have engaged more with international audiences or people from other cities in their country, but there appears minimal exchange between festivals in South East Asian in terms of the audience. With the increasing development of internet and technological fields, we could see the rise of digital festivals, or internet-based festivals, that are very strategic to reach out global audiences across boundaries of countries or geographies. While the new phenomenon of digital festivals emerges significantly, we have to underline the fact that the internet itself is still quite an elite resource, that is more accessible for the middle-class elite, particularly in places with very limited access to internet infrastructure.

Image Credit:
Jogja Fashion Week |
Yogyakarta, Indonesia



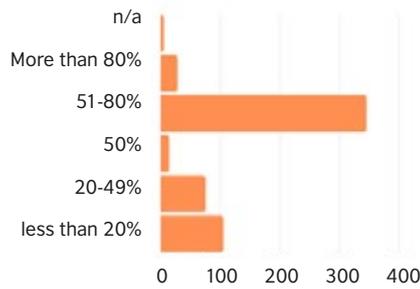
Gender and Disability

Festival organisers have opened more opportunities and involvement for women, other marginalised genders and disabled groups, either to take part in organizing, or as participating artists and performers. This should be appreciated since South East Asian society is still very patriarchal and the role of women in public sectors still limited (sometimes means domesticated). The respondents seem very much aware of the importance of increasing the involvement of women (and others), so in the past years we have seen that in almost all aspects of a festival, women are present as team members, fulfilling roles as curators, managers, technical teams, talents and others.

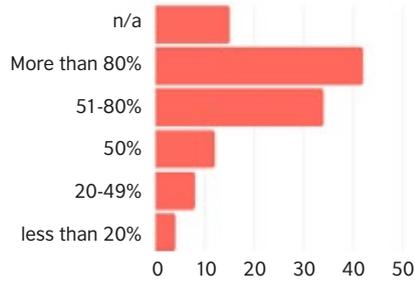
We have seen an increasing number of women as festival leaders and curators, and one could hope that this will open more opportunities for women artists as well. In the future, we held out the hope that it is not about increasing the number of representatives, but also the perspective that is more advocating gender issues, and to support festivals as a safe place for women.

The pandemic has been a disruptor and accelerator across the festival landscape. It has brutally exposed inequalities and the fragility of the cultural sector, including festivals. It has also accelerated a move on-line, with festivals super-charging their digital presence and working towards a more hybrid future where physical and digital presence co-exist more compellingly than pre-pandemic.

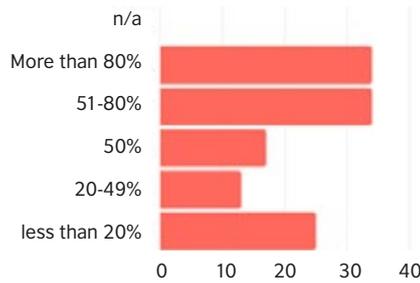
The pandemic has hugely damaged trust on safety from the audience perspective, and shattered many festivals' business models. Urgent recovery is required and a programme to redevelop investment is needed for them to play a galvanising role in the post-Covid creative economy. The virtual world also offers the possibility to bring together local talents and global audiences at the same time beyond geographical boundaries, allowing new connections to emerge between festival organisers during this period of time.



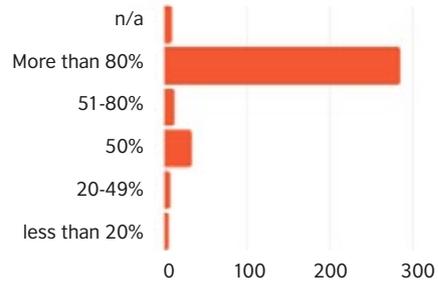
Leadership Position e.g. Festival Directors and Board Members



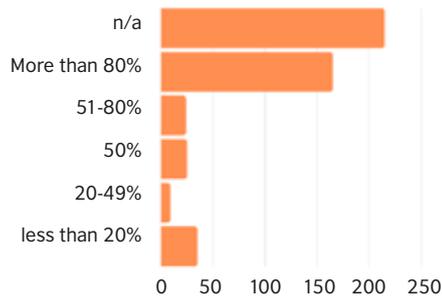
Management Position e.g. Festival Managers



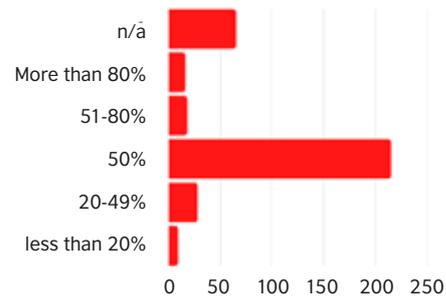
Programming/Production Team



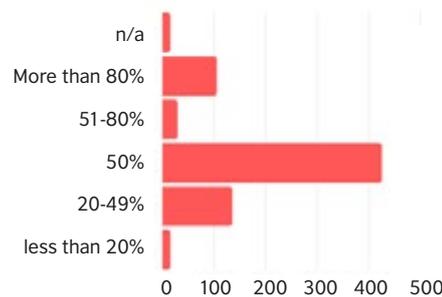
Outreach & Education Team



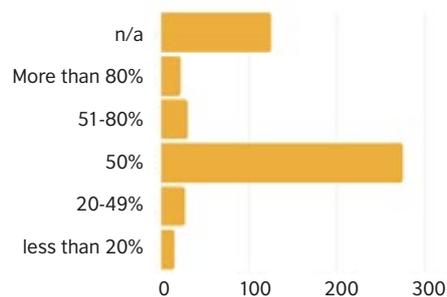
Volunteers



Technical Support Team

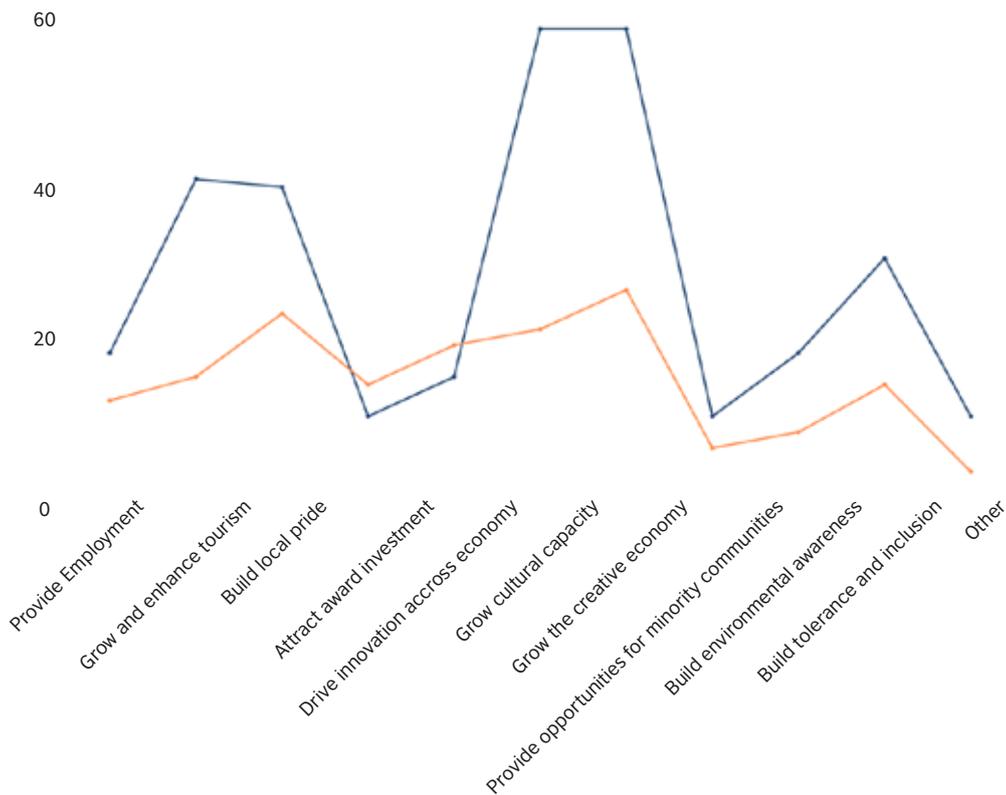


Artist & Creative Talents



Other Staff Members

While it has been strongly shown that festivals have great impact as collective catharsis and strengthens cultural identity, the same case cannot be obviously revealed when it comes to the economic impact of the festivals. There is still very minimum study on this and many festivals often do not have the right instrument to measure such impact. Indeed, for creative economy agencies, artists, curators, media, venues, products, the festivals have played a great deal in creating a transactional platform and to show how art and culture could economically benefit other sectors, in particular tourism, small enterprises, food and culinary, or other sectors.



4.8 Regional Needs

Business planning skills, leadership effectiveness and team capacity are top business development needs. There is a need to build managerial capacity overall and to boost marketing, promotion and data analytics skills.

Strategic partnerships are identified as primary development areas for festival sustainability and growth. This includes partnership with Government, education providers, the wider cultural sector (e.g. museums), and with enterprise.

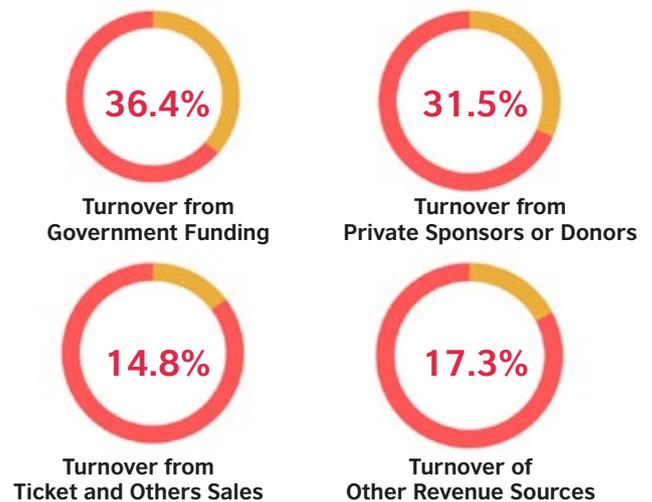
There needs to be a reframing of the value proposition for festivals where the Government invests in them for reasons other than simple tourism or place-marketing. This can work to sanitise festivals and compromise the integrity of their creative programming. Festivals require investment which enables them to lead on programming, to commission new and often radical work, and thus to become compelling platforms and catalysts for innovation and change in the creative economy.

4.9 Festival Funding

With the lack of state-owned cultural infrastructures in many South East Asian countries, it is not surprising that most respondents of the survey come from

festivals initiated by non-profit organisation/foundation or private initiatives (around 30 percent each), 15 percent were owned by government and the smallest portion, and less than 15 percent is result of collaboration between private and public organisation. This fact also emphasises the fragility of festival organisations in South East Asia, since there is no long-term commitment from government or funding bodies, and most rely on the support of local audiences, or the strong networks between artists themselves in order to annually realize the intended festival.

Festival Fundings



Chapter 5 Countries Highlight

5.1 Indonesia

5.1.1 Overview

Most festivals in Indonesia are strongly influenced by local culture. They are often initiated by young people targeting an even younger generation. Various creative innovations are produced in the context of these exhibitions. Festivals have been important promoters of the creative economy movement, impacting everything from tourism to international diplomacy.

Along with the determination to preserve cultural heritage, many traditional practices have brought forth innovative festival ideas and become the inspiration for festival programming. Festivals have become a collaborative space where artistic and cultural creations are united. These events are places to celebrate cultural diversity, harmony and to showcase local cultural expressions and its surrounding environment.

Festivals in Indonesia are mostly initiated by young people and people in their productive age. They aim to make festivals a cultural and educational space for the current generation so they would love and care more for their cultural heritage. Thus, festivals are held to create various kinds of collaborations, a vehicle for joint creativity in art and cultural networks.

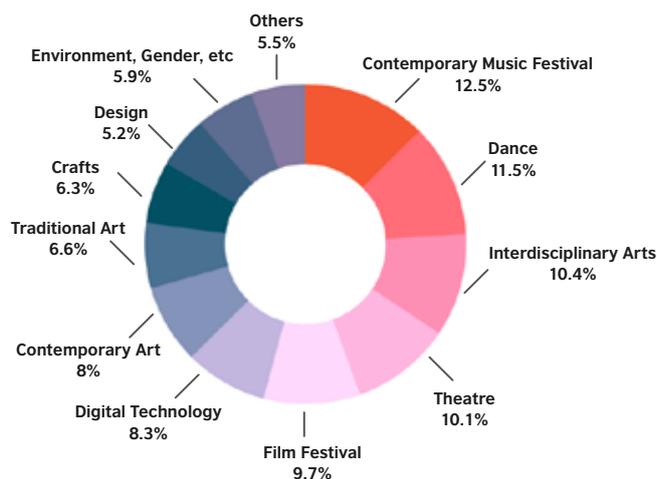
More and more festivals in Indonesia are introducing creative and innovative ideas, the need of registering and promoting their intellectual properties. The latter being inherent to creations which may take the form of contemporary works, be it in the form of art, archivals, the research or development of modern works. The Covid-19 pandemic has pushed festivals to opt for a hybrid format in their presentation, offering both interactive online and offline experiences.

Furthermore, festivals in Indonesia have become an important part of the creative economy

movement. As creative meeting spaces, they bring together the industry's practitioners and players from all sectors, paving the way to productive collaboration. These participants and audiences meet to discuss relevant issues and the latest technologies, share ideas and experiences, showcase best products, transact with each other, and together with the audience form a hub for the creative ecosystem.

Many festivals also take advantage of international networks in order to access and be part of the international community, thus the showcasing of creativity and enhanced craftsmanship, not only widely propagate skills, knowledge and education; it gives international insight into every creative sector internationally.

Viewing the Indonesian festival landscape one finds a focus on performance genres. These would include contemporary music festivals (pop, jazz, alternative, metal, rock and so on) at a percentage of 48.28%, followed by traditional music (41, 38%), dance (37.93%), interdisciplinary Arts (34.48%) and theatre (33.33%). Somewhat middle of the scale are film festivals (32.18%) and digital/technology festivals (27.59%). Visual art genres, be it contemporary art (26.44%), traditional art (21.84%), crafts (20.69%) and design (17.24%) are pegged to lower middle spot. Design is at a slightly lower position compared to creative genres that raise issues such as environment, gender, and so on. The latter reaches up to 19.54%. Other not yet listed festivals (amounting 18.13%) highlight themes such as science, advertising, media, automotive, hobby biking, bonsai pruning, ornamental fish breeding, literature, exhibitions, art of engineering, photography, fashion, popular games and traditional sports.



Most festivals in Indonesia (based on answers given by 87 festival respondents) have existed for quite some time, most have been held for 2-5 years (36.78%, 32 festivals), 6-10 years (28.74%, 25 festivals) and some are older than 10 years (31.03%, 27 festivals). A few new festivals now grace the landscape and have only been held once (3.45% 3 festivals).

87 Festival Respondents



The average duration of the main event at the festivals mentioned above also varies. Based on the responses obtained, most run about 1 week (41.38%), some cover one or two days (35.63%). In addition, there are also those whose main activities last up to one month (5.75%), 3 months (2.30%) and more than 3 months (2.30%). Apart from that, there are durations of 3 days or 2 weeks (6.90%).

The survey also indicates that most main events in a festival are held once a year (67.82%), some are held every 2-3 years (18.39%), and some are carried out routinely several times a year (10.34%), every month or 2-3 months. But there are also non regular festivals (3.45%) which are dependent on particular conditions and programme orientation.

Citing responses from 87 participants of long-standing festivals, most are privately owned — by a non-commercial collective or individual (37.93%, 33 festivals). Festivals can also be organised by non-profit organisations or registered foundations (31.03%, 27 festivals). Several festivals are also held in collaboration between the government and the private sector (private-public partnership) about 12.64%, (11 festivals). There are also private-owned festivals by commercial entities (12.64%, 11 festivals). Finally there are quite a few festivals organised by the Indonesian government (government owned), but only 5.75% of the respondents participated in about 5 festivals.

5.1.2 Festival Genres and Location

The festival content and location indicates the importance of each festival in Indonesia for the development of the creative or social and cultural economy. From the various creative genres mentioned earlier, all tend to focus on different activities.

The main activities of music festivals tend to be concerts, cross culture music performances, covered concerts, workshops, exhibitions, seminars, talk shows, and branding activities. Various types of collaboration can be the outcome of their programme's design, including events designed for younger participants which promote the regeneration of musicians. Furthermore, festivals with performing arts genres such as dance, tend to showcase works of young dancers, besides an array of performances of senior dancers and choreographers, workshops, master classes, artist talk and performing arts collaborations between artists from various countries. While in the theatre genre, festival activities offered to the local public include major classic and shorter forms of theatre, like skits, mime and experimental forms, workshops in directing; performance and actor management; monologue competitions; and artistic, script writing for theatre, besides various discussions and reading of new manuscripts by the writers or staged reading by a select team. Translators and translations are usually on hand for international audiences. The same applies to film festivals, albeit the main focus is usually film screenings, a broader palette of activities is offered, including exhibitions, workshops, presentations, seminars and film discussions. In addition, generally a film makers competition is included in the program design in order to motivate and encourage young and emerging filmmakers. These competitions are usually announced several months prior to the festival and generally, these 'competition' films are then screened during the festival and the winners are awarded on a special day at the end of the festival. These 'competition' films are generally also screened during the festival and the winners are awarded on a special day at the end of the festival. The main activities of an art festival (both fine arts and crafts), have

a similar format, which offers the public and social media audiences an array of exhibitions, workshops, seminars, presentations of cross-disciplinary art forms, book publishing, discussions, residencies, and various spaces to appreciate the art presented in the festival. New media art forms, such as video mapping, light-based visual arts exhibitions/digital video have slightly more specialized activities. They are generally strengthened with seminars on new media art in order to assist audiences to understand the language, function, and complexity of this art form.

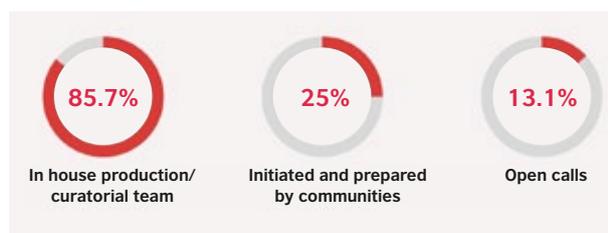
Aside from this, festivals are also held in the field of science and technology. In these festivals, the main activities tend to be symposiums, conferences and workshops, as well as exhibitions of innovations in the particular field launched by relevant organizations, foundations, companies, and universities.

Creativity is not the sole monopoly of artistic genres, thus even in festivals that focus on technology, discussions about the intertwining of artistic developments and technological practices abound. Aside from design, festivals in the automotive sector tend to be cross cutting. With activities like gatherings, exhibitions and contests, entertainment and photo contests, artistic exhibitions of engineering pieces of works, spare parts and merchandise exchanges, sharing of knowledge on creative modification, custom painting and artwork, there are also educational activities which promote better driving and understanding of traffic. Often vendors open booths which exhibit specialized fashion apparel, offer custom made crafts, community lifestyle needs and the omnipresent locally trendy food and beverage stalls. Food is an important aspect of Indonesian culture, therefore it tends to be part of the Indonesian cultural festivals - which focuses on the characteristics of the highlighted regions. Besides main activities which include performing arts, discussion of traditional culture and arts, traditional sports competitions, traditional and coastal dance competitions, community theatre and carnivals, film screenings, exposure of local studios/communities working in sustainable innovations - there are also workshop activities on culinary, creative and natural resource markets.

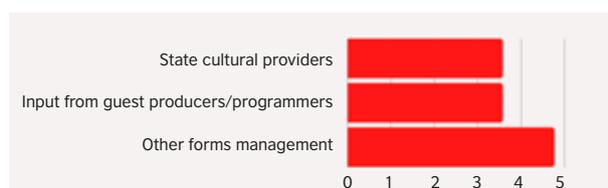
5.1.3 Festival Management

In organizing a festival, a support team of reliable and creative human resources should be embedded in its management. These may consist of full-time and part-time festival team members. In addition, volunteers play an important role in Indonesian festivals, and assist the successful running of each programme.

Festival management in Indonesia is mostly programmed by an in-house production or curatorial team (85.71%), they are the main driving force for the event. Aside from this, are festivals initiated and prepared by communities (25%), some of these include traditional rites/rituals focused festivals, but other community festivals are managed through open-calls (13.10%).



Festivals organized by the national or regional government are managed by state cultural providers (3.57%) with input from guest producers / guest programmers (3.57%). In addition to those previously mentioned, there are other forms of management (4.76%) such as committees formed by professional associations, external curators, and multi-stakeholder engagements with local governments, civil society, academics, and communities.



There is no set number to the size of a festival management in Indonesia. Collected data shows that it is of varying size and is usually a combination of full-time and part-time members. Most festivals lean on a full-time team of 5-10 people (34.52%), while others are managed by less than 5 people (25%). Large festivals tend to

have a sizable full-time team of more than 20 people (22.62%) and between 11-20 people (17.86%) for medium sized festivals. Generally, part-time part-time team members are more involved in festival planning rather than management, reaching more than 20 people (42.86%) and between 11-20 people (25%), followed by 5-10 people counted for 17, 86%, and less than 5 people which is only 14.29%.

The number of volunteers who are members of the festival management team varies, in Indonesia they often play key roles in the programme. According to the collected data, volunteering members of the management team range from 10-30 people in 32.14% festival cases, 50-100 people in 21.43% of the festivals surveyed, and 30-50 people in 21.43% festivals, followed by the highest number of volunteers 100-200 people at 9.52% and more than 200 people at 5.95% of the surveyed festivals. Though, there are festivals with only a small number of volunteers, with less than 10 people at 7.14%. There are also festivals with no volunteer involvement, these are somewhat rare and amount to only 5.95% of the festivals surveyed.

5.1.4 Festival Financing

One of the most important things in order for the festival to run well is the existence of good financial management for every programme. Funding can be obtained through various efforts by the organizers, such as sale of festival tickets or fees, acquiring funding support from the government, sponsors or donors from private parties, or from various sales during the festival and other sources of income.

From the results of research conducted on 87 festivals in Indonesia, 52.38% (44 festivals) held the festival for free, with the possibility for anyone to participate in the entire series of activities. Then 18 festivals or about 21.43% make use of tickets or paid passes to participate in the events. The remaining 22 festivals, reaching a percentage of 26.19%, use a combination of tickets and free entry to the certain events on the program offered. This combination of free and paying activities can be based on whether the event could be subsidised by a percentage of sales from the products exhibited, whether an event or performance

involved high production costs, or based on the purpose of an event - such as those that act as an educational service for the public. Often exhibitions and discussions, as well as distinctive events for the surrounding society, communities and students can be offered as free programmes in festivals when they receive partial or full sponsorship from festival partners.

Finally, according to the survey of the 87 festivals in Indonesia, festival funding is mostly (34.99%) derived from sponsors or private donors. . Approximately 27.60% comes from government funding. Other revenue sources of income reached 22.35%, this can be from early fundraising events, in kind support, and personal funds. Ranking lowest, but could be further explored, 15.06% of said festivals derive an income from tickets and other sales such as merchandise, food-beverage sales, and workshops offers.

To the open question of priorities [Q44], 68 respondents from the 87 festivals included in the Indonesian survey, gave a more detailed description. The survey questions were clustered thematically into financial and other support; networking; engagement, reforms, inclusion and growth. 21 (30%) respondents stated finance matters as their priority. 10 (16%) stated networking as their priorities, 10 (16%) stated they prioritize efforts to reform the government and stakeholders. Some respondents (6 respondents) mentioned Engagement, such as wanting more participation from the audience, as well as stakeholders. Some others (8 respondents)) prioritize improving their management and capacities. Only two mentioned inclusion as their priority, one specifically targets the disabled, the other mentioned a broader range of marginalized communities. Only one prioritized the economic recovery of communities.

The finance and support theme reappears as a dominant issue, on the questions of barriers encountered [Q45]. 27 out of 65 (41%) responded that financial support is the main barrier to achieve their goals.

Another 12 (18%) stated completely external, non-financial barriers, amongst these, are the political situation that leave little space for inclusion and arts; red tape of government

bureaucracy, shifting societal parameters such as the fast changing society, and relatively low interest in specific areas of the Arts.

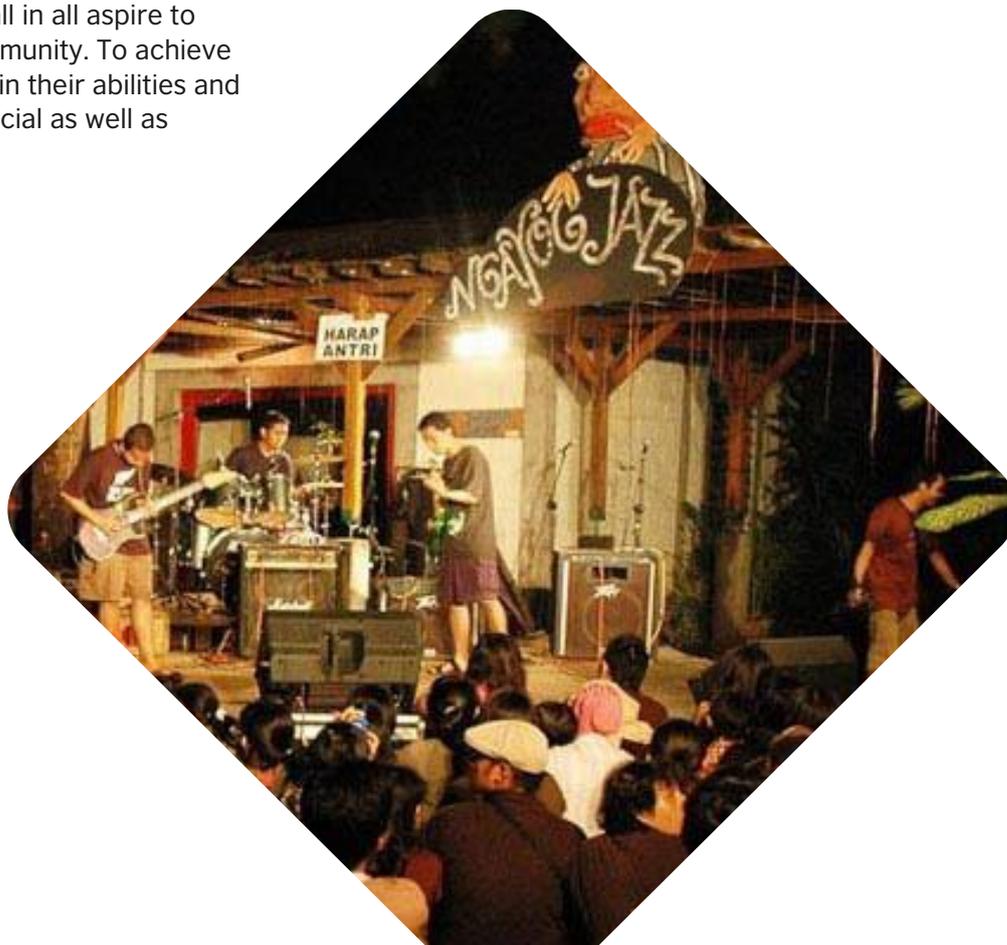
5.1.5 Festival Development Needs

Management capacity is a major cluster that most festivals want to improve. The two questions on business development needs and management development needs pointed out that organisation management, leadership, and event/production management sits on the top of their priority needs, while branding, intellectual property, and relations management appeared less pertinent. However, in the explicit question of what they need, only 7 mentioned financial needs, while others ticked organisation management needs. Based on the responses, it can be deduced that the wish to improve their capacity in managing events and festivals in national as well as international level lays at the core of their needs, followed by the need of better support and function at human resources and organisational management. One organisation specifically mentioned their need for database management.

The festivals in Indonesia, all in all aspire to engage with the wider community. To achieve this, festivals want to grow in their abilities and seek ways to mobilise financial as well as non-financial resources.



Image Credit:
Ngayogjazz | Yogyakarta, Indonesia



5.2 Malaysia

5.2.1 Overview

Malaysia is diverse. A Mosaic. But diversity is also political and not every community has equal access to resources or a platform.



Malaysia, a mosaic of different cultures.

Malaysia Pavilion at Expo Milano 2015¹

Polytechnic and multilingual, the imagery of a 'mosaic' has been coined by academics and practitioners¹ to denote the celebrated multicultural diversity of Malaysia. In addition to Malay (comprising at least 15 million speakers in the population of 32.7 million), the four most common or 'vernacular' language groups, typically known as:

Chinese (Mandarin, Cantonese, Hokkien, Hakka among others); Indian (Tamil, Hindi, Telugu, among others); Kadazan and Dusun (languages of the main indigenous group, Kadazandusun, in the state of Sabah); and Iban (language of the main indigenous group, the Iban, in the state of Sarawak).

Malaysia is also a regionally diverse nation, with distinctive cultural assets across the country and a set of compelling place-based cultural assets. Economically and politically, Kuala Lumpur and the Klang Valley (which includes the administrative capital Putrajaya) have grown in significance over the last 30 years, symbolised by major architecture projects such as the Petronas Towers, or through the growth

in key sectors such as financial services, retail and digital.

KL and the Klang Valley, a congregation of over 8 million, is also a major cultural and creative hub and gateway for talent and investment from across Malaysia. However, the nation's regional diversity remains a significant asset and cities such as Georgetown (Penang), Kuching (Sarawak), Malacca, Ipoh and Johor, have increasingly compelling cultural offers and provide for a different quality of experience to the fast pace of KL.

Malaysia, which has seen a generation of rapid urbanisation and the growth of a middle class with greater spending power and more leisure time, has seen signs of urban renaissance. The restoration of heritage landscapes in, for example, George Town, Johor Bahru and Ipoh, has been followed by the development of dynamic creative hubs, often in historic buildings and neighborhoods. The country has an active urban planning and place-making movement, with Government-backed agencies such as Think City working alongside community-driven and creative-led activities to re-imagine and regenerate the urban landscape. Robust bottom-up movements have led to a rise of alternative spaces which act as critical anchors for activism.²

Festivals are a vital force in Malaysia's creative economy. Hugely damaged by Covid-19, they will be a force for renewal in the future. As demonstrated in the case studies below, they are a huge force for development, innovation and growth across the Malaysian creative economy. Their diversity is testament to the ethnic and regional diversity of the country and to the scope and potential of festivals to reflect on and amplify the contemporary realities of culture in Malaysia. This is evidenced in the range of impact-facing festivals in Malaysia, which seek to raise awareness of social and environmental issues as well as to nurture opportunities for indigenous / diverse talent to flourish. It is also evidenced in the more commercial or 'trade'-focused creative festivals and market places, especially in KL. These play a role in building capacity and driving growth across the creative economy.

¹ <http://www.expo2015.org/magazine/en/culture/malaysia--a-mosaic-of-different-cultures.html>

² p.2, BC Connecting Creative Communities: Creative Hubs in Malaysia, Thailand, Indonesia and the Philippines (2017)

Survey respondents in Malaysia point to the following headline issues, needs and opportunities:

Broadly, the festivals operate in a 'mixed economy', where they draw on a blend of public and private finance for their sustainability. Public finance has proved particularly difficult to access and Covid-19 has exacerbated this situation. However, overall the festivals demonstrate resilience and a smart approach to business planning and operations.

Inclusivity and diversity among performers and audiences are considered as important across festivals surveyed. This includes ethnic and gender inclusion. Female participation is demonstrated in staff composition, with leadership, management and production positions of around 80%. Ethnic and religious diversity is a primary focus:

“

When curating programmes, it is a conscious decision to include voices from lesser represented groups including those from east Malaysia depending on their availabilities.

Swarna Rajagopal, Festival Coordinator,
George Town Literary Festival



Image Credit:
George Town Literary Festival | Malaysia

5.2.2 Festival Development Needs

Local audience participation is ranked among one of the most important development needs. Young audiences and students are identified as a top development priority. Vital in reaching such audiences is harnessing the power of social media and building a stronger digital presence overall.

Maintaining healthy networks with the artistic professionals is considered very important. Schools and universities are ranked as top partners to develop and maintain relationship with, alongside media critics.

Access to local and international networks is critical to contribute to availability of industry information and exchange and access to international community of practitioners.

Festival organisers view growing cultural capacity, developing the creative economy and building tolerance and inclusion as priority themes for development. Building local pride, environmental awareness, tolerance and inclusion are primary ways the festivals reach out to government / public stakeholders. To private stakeholders, priority is given to growing cultural capacity, growing the creative economy and providing opportunities for minority communities.



**On the value delivered:
“[Rainforest World Music Festival creates] communal and spiritual connections – Less “fear” and more tolerance and appreciation of otherwise unknown cultures.”**

**Jun Lin Yeoh, Artistic and Production Director,
Rainforest World Music Festival**

Concerning long-term plans post-covid, most festivals will continue their model as before, but placing more focus on digital presence. Strategic partnership and financial sustainability are ranked as the most important developmental focus. Government buy-in and protection for freedom of artistic expression are among other concerns

*Image Credit:
Rain Forest Music Festival | Malaysia*



5.3 The Philippines

5.3.1 Overview

The Philippines, an archipelago nation with over 7,000 islands and a population of over 100,000, is a critical force in the development of South East Asia's Creative Economy. The nation has embarked on an ambitious creative economy programme, with senior-level Government support to diversify the economy and position creativity as a force for social and economic transformation. A national creative economy development programme is currently underway, which will shape the country's first Creative Industries Strategy. This is further supported by an ambitious programme to supercharge the creative economy through Design (led by the Design Council of the Philippines); and multiple place-based creative cluster, hub and partnership activities. Cebu has played a pioneering role as a creative city, with a strong focus on social impact and inclusion through design. Further north on Luzon, the city of Baguio was established as the nation's first UNESCO Creative City, with a focus on Crafts.

The Philippines is also pioneering the role of creative hubs – as safe spaces for creative expression and exchange and as platforms for inclusive growth. The British Council has played an active role in championing the development of creative hubs and multiple new hubs have emerged in recent years. Many of these are impact-facing and values-based, seeking to support talent, encourage environmental responsibility and tolerance, and nurture innovation.

Festivals in The Philippines have played a major role in the development of the creative economy. They have helped raise awareness of the Arts and wider cultural sector in building stronger communities and in breeding pride and responsibility. They are also critical connectors between grassroots cultural activity and the more commercially facing creative industries. As illustrated in the case studies below, festivals in The Philippines are diverse and play different roles in shaping the wider creative economy. They are struggling during the Covid-19 crisis, with limited recovery support from the

Government and a dramatic loss of income. But they are poised to come back stronger in Post-Covid recovery, playing a revitalising force as people return to physical congregations and as artists and creative practitioners seek platforms for their diverse expressions.

5.3.2 Impact to creative economy

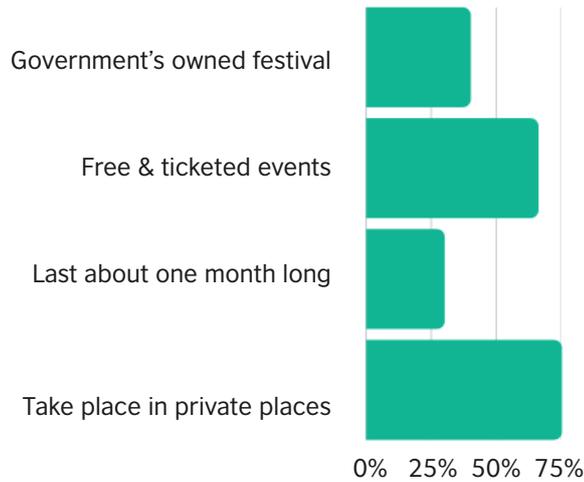
Festivals in The Philippines have played a major role in the development of the creative economy. They have helped raise awareness of the Arts and wider cultural sector in building stronger communities and in breeding pride and responsibility. They are also critical connectors between grassroots cultural activity and the more commercially facing creative industries. As illustrated in the case studies below, festivals in The Philippines are diverse and play different roles in shaping the wider creative economy. They are struggling during the Covid-19 crisis, with limited recovery support from the Government and a dramatic loss of income. But they are poised to come back stronger in Post-Covid recovery, playing a revitalising force as people return to physical congregations and as artists and creative practitioners seek platforms for their diverse expressions.

5.3.3 Festival Development Needs

Survey respondents in The Philippines point to the following headline issues, needs and opportunities:

There is a youthfulness and freshness to the festival sector in The Philippines. Over 80% of the audience is between 21-35 years old for both live and online activities. 40% of the respondents are young festivals between 1-5 years old. This gives them a vitality but also a fragility – especially with Covid-19

The festivals are, broadly, operating in a mixed economy. 40% are solely government owned. 66% of the festivals run on a mixed format of free and ticketed events.

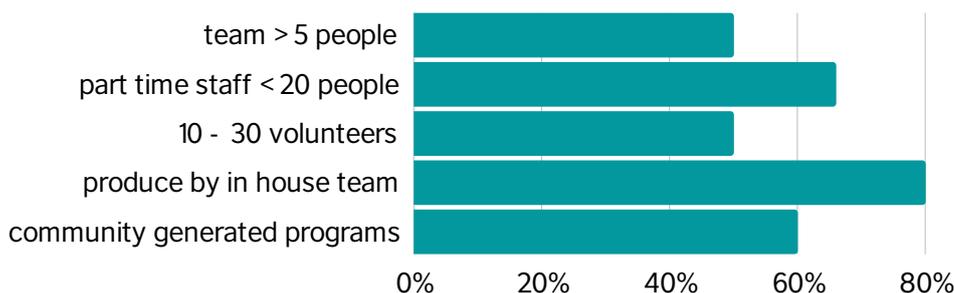


On the value of the festival, “[Design Week Philippines] helps creative hubs and design businesses to increase visibility, acquire sponsors and government projects, and drive foot traffic.”

Kenneth Biunas, Senior Trade Industry Development Specialist, Design Week Philippines

There are different strategies in place in terms of the longevity of programming and the contexts for the development and presentation of creative work. 30% of programming lasts about 1-month long. Events primarily (75%) take place in private spaces such as galleries, cinemas and retail environments.

The festivals tend to be led by small teams – almost like micro social enterprises. 50% of the festivals run on a tight permanent team of under 5 people and 66% with part-time staff of over 20 people. Scale is enabled through a reliance on volunteers. About 50% of the festivals have 10-30 volunteers. Over 80% of the festivals produce the events by in-house team, complemented by over 60% of community-generated programmes.



This micro scale requires festivals to work hard to build local audiences – which are considered as the most important factor by over 80% of the respondents. 41% respondents have a live audience size of under 5000 (mostly local) people. Arts and creative professionals take up a substantial portion of its live audience group. Thus, the Philippines festival sector could be described as a portfolio of boutique providers which collectively provide scale and diversity to drive innovation and growth in the creative economy.

For Philippines festivals, there is a very clear emphasis on supporting talent to come through, with festivals operating as breeding grounds for talent development in the creative economy. Over 90% considered awareness building, showcasing talents via talks and panels as top priority focus for programming. This is followed by talent incubation and development as well as social engagement each at over 80%. The importance of commissioning new art works and marketplaces and fairs come third at 75%.

We work with Business Support Organizations per sector in the program planning, invitation, and dissemination, to reach more stakeholders, ensure proper vetting of participants, and giving equal opportunity to regional participants.

Antonio Agulto, Senior Trade Industry Development Specialist, Create Philippines

The artistic and creative community is ranked as a very important stakeholder by over 80% of the respondents. Schools and universities are considered very important stakeholders by 75% of the respondents. Other peer Arts and creative professionals and local community leaders at 66% of the respondents.

Festivals in The Philippines are increasingly impact-facing and underpinned by a set of progressive social and environmental values. Diversity and inclusion among performers and creative talents are considered very important by 83% of respondents, while 50% believe the same issue is very important among staff and organising teams.

Over half of the respondents have 51-80% female representation in leadership, management and programming / production team.



We ensured accessibility for deaf, LGBTIQ persons; featured work must also be inclusive by having artists from rural areas, ethnic minorities, religious minorities, persons with disabilities, etc.

Ryan Silverio, Regional Coordinator, Southeast Asian Queer Cultural Festival

In addition to the dedicated social and environmental role of festivals in The Philippines, festival managers are also very conscious of their role and responsibility in nurturing **a progressive and dynamic creative economy:**

Over 90% of the respondents considered growing the creative economy as a very important focus of their platforms. When communicating with government and public stakeholders, a variety of strategies are employed, ranging from stressing on the growth of creative economy (50%), growing cultural capacity (41%) to growing and enhancing tourism (41%). As to private stakeholders, the focus of messaging lies in building local pride (75%).

*Image Credit:
Southeast Asian Queer Cultural
Festival | The Philippines*



5.4.3 Core Festival Development Needs in The Philippines

45% of the respondents considered changing their festival model for 2022 to include more of a hybrid offer online – with post-Covid resilience and relevance paramount.

Strategic partnership is considered very important by over 90% respondents as the roadmap to achieve long-term aspirations. This is followed by audience development and financial sustainability (81%). There are significant capacity needs for the festivals to attain a level of sustainability and then long-term growth. Stakeholder relationship development and management is considered as a primary developmental goal for creative development.

Government support in the form of policy direction on tax incentives, supportive environment and funding is considered critical issues to be addressed to foster greater growth. However, the government is not yet sufficiently supporting festivals as a vector for wider creative economy development. This is particularly the case for impact-facing festivals, whereas market-facing festivals (e.g. showcases) have greater public and private sector support.

36% respondents ranked leadership effectiveness as organisational development priority, followed by ability to plan a business plan. Marketing, data analytics and promotion skills are identified as a desired skill set for capacity building.

Expanding networks, availability of industry information and exchange and increase in organisational credibility are considered the top three benefits of joining local and regional networks. There is also growing awareness of the need to diversify the festival workforce.



We do our best to involve artists and staff of all genders. We have both professional and nonprofessional artists as part of the team.

Dominique G. Torres, Production Manager, Virgin Labfest

5.4 Vietnam

5.4.1 Overview

Vietnam has seen remarkable economic growth and social development since the Đổi Mới reforms 30 years ago. As a country which suffered incredible hardship both through the 1955-1973 war with the United States and during the subsequent recovery process, Vietnam is today one of the fastest-growing and most dynamic major economies in the world while remaining a single-party socialist state under the rule of the Communist Party of Vietnam. Vietnam has seen major demographic change in recent years, with a population of 95 million, 70 percent of whom are under 35, a rapidly growing middle class (13 per cent, estimated 26 per cent by 2026) and GDP per capita of \$2,343.10.1. Coupled with the growth of the country's digital and technological industries, Vietnam is increasingly known as a country of young producers and consumers with expanding investment opportunities. The country is showing increasing confidence

with regard to its cultural assets and the potential of its creative economy. Huge growth in tourism and inward investment have opened-up Vietnam's economy and triggered a new generation of arts and creative practice. Yet the country's openness is tempered by a still very active approach to cultural censorship and the denial of truly diverse cultural practice.

The last decade has seen a substantial change in the awareness, formulation and implementation of cultural policy in Vietnam. This is as part of the country's 'marketisation' of the economy, with the cultural industries and 'creative cities' recognised for their potential to drive up GDP and to showcase the country's distinctive culture on an international stage. In 2014, the government selected the development of cultural industries as a new key national objective to:



Explore and promote the unique potential and values of Vietnamese culture; encourage cultural product exportation, and contribute to promoting Vietnamese culture to the world.

11 th Central Committee of the Communist Party of Vietnam.

In implementing this, in 2016, the government introduced the National Strategy of Cultural Industries Development in Vietnam by 2020, with a vision to 2030. The process of Strategy development was supported by UNESCO under the 2005 UN Convention on the Protection and Promotion of a Diversity of Cultural Expressions; and by the British Council as part of its creative economy programme. The Vietnam Institute of Culture and Arts Studies (VICAS) played an instrumental role in developing the Strategy, working in partnership with the Ministry of Culture, Sport and Tourism.

As a direct extension of this national strategy, local governments have since produced parallel strategies and action plans for the development of arts and culture at city level.

Depending on local strengths, these city action plans focus on areas such as cultural tourism, film, performing arts, fine arts, photography, urban development, advertising, and so on. Increasingly, festivals are being positioned as vital catalysts for city-based creative economy development – as demonstrated in the case studies below. However, the festival scene is still very emergent and fragile in Vietnam, with significant dependence on Government support (for funding and to avoid censorship). Private financing is still emergent and the Covid-19 pandemic has weakened the handful of festivals seeking to diversify income streams. However, the increased importance afforded by the Government to the Cultural and Creative Industries mean festivals in Vietnam are sure to play an important role in recovery and renewal.

5.4.2 Needs and Opportunities

Survey respondents in Vietnam point to the following headline issues, needs and opportunities:

Government funding and support is vital for any festival to start-up and survive. There isn't yet a truly independent festival scene in Vietnam. However, **a more blended business and governance model is emerging.** Of festivals surveyed, Government owned, public-private partnership and privately-owned each represent 30% of the respondents.



LIÊN HOAN PHIM QUỐC TẾ HÀ NỘI LẦN V

27/10/2018 - 31/10/2018

Image Credit:
Hanoi Film Festival | Vietnam



Festivals are increasingly blending traditional and contemporary art forms and connecting physical and digital activities.

Festivals are imaginatively utilising the spaces and infrastructure of their host cities. Private exhibition spaces are the most common type of venue, followed by government owned exhibition spaces and private performance venues. Informal / mixed-use venues account for over 60% of the events – this includes creative hubs such as co-working spaces, universities, and artist studios. In Vietnam the growth of contemporary festivals has coincided with the growth in creative hubs, which provide a vital infrastructure for festival development and presentation.

Festivals in Vietnam are demonstrating a commitment to local talent development, showing a level of openness and co-creation to their programming. Many festivals rely on open call submission for programme. 66% depend on in-house production / curatorial teams. Priority programme commitments in Vietnam include: Talent incubation and development, talent showcasing, talks and panels, creative talent exchange, and other cultural exchange.

Hanoi International Film Festival promotes the cordial spirit, the sharing among filmmakers, delegates, guests and audience responses from cinema world for the aim of sustainable cinema development.

**Le Thi Thu Ha, International Cooperation
Manager, Ha Noi International Film Festival**

Festivals in Vietnam are showing a commitment to a set of social outcomes and are increasingly impact-facing:

Over 80% of the respondents considered diversity and inclusivity among staff members are important. Over 60% of the respondents have over half of their leadership positions as female.

Festivals rely heavily on local audience attendance, which requires strong levels of local engagement and partnership. This includes a focus on the ethnic diversity of talent and in connecting traditional cultural practice to contemporary culture.



Many companies and villages of ethnic groups join in the festival every year. About 20% of exhibited crafts are produced by or originated from ethnic groups.

Le Quoc Vinh, Chairman, Hue Traditional Crafts Festival

5.4.3 Festival Developmental Needs

For audience development, over 80% of the respondents consider local audiences as a very important focus and South East Asia's audience as important. This balance of being locally relevant and reaching wider audiences is a key area for development and support in the future.

50% of the respondents identified growing cultural capacity and growing the creative economy as key commitments of their festivals. When communicating with government and public stakeholders, over 80% of the festivals focus on the value of cultural capacity and creative economy development.

As to addressing the importance of festivals to private sector stakeholders, 80% of the respondents focus on the role in growing the creative economy and 50% on attracting inward investment. There is a related need for strategic support in management and entrepreneurship to realise this opportunity. Most festivals are 'self-starting' and haven't got these skills in-house, requiring instead to 'learn as you go'.



Growing cultural capacity and the creative economy



Cultural capacity and creative economy development



Growing the creative economy



Attracting inward investment

Business planning skills are identified as a primary skill set for development. This is followed by leadership effectiveness and human resources development / team capacity building. Strategic partnership development is considered optimal skill sets for creative growth.

All respondents considered financial sustainability as very important for their growth, while 80% identify strategic partnership as critical.

Government support in fostering a robust environment that is friendly towards artistic freedom, funding and social stability is also identified as significant to sustainable growth.

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The Festival has been a formal platform to showcase the rich and profound creativity and culture of Vietnam and present a sustainable approach in connecting traditional culture with modern life.

Nguyen Thi Thu Ha, organiser, Vietnam Design Week 2020



*Image Credit:
Vietnam Design Week | Vietnam*

5.5 Thailand

5.5.1 Overview

From survey responses, it is found that owned websites, Facebook, and Instagram are the festivals' most popular social media for communication with their target audience. In terms of art form and/or creative genre, the top three focuses for festivals in Thailand are contemporary music (64%), interdisciplinary (59%) and contemporary visual arts (55%). This is probably because these festivals either receive government support in accordance with its creative economy policy or are organized by major entertainment industry agencies for marketing purposes, especially the music festivals. In addition, it is indicated that in the past five years, many festivals (55%) have been initiated in line with the government's policy on creative economy and people's changing lifestyles. Besides, the findings show that most festivals are privately owned by non-commercial collectives or individuals (41%). They are either small-scaled, with the average size of live audience of fewer than 5,000 people (48%), or medium-scaled festivals, with that of 5,001-10,000 (14%) and 10,001-50,000 (14%), with the short duration of about one week long (32%) or even under three days (27%). It is notable here that government-owned festivals, in contrast, are more successful in terms of audience reach and are more widely recognized. Apart from their main activities/events, most festivals feature as their key parts talent showcasing (76%), talks and panels (76%) and marketplace and fairs (71%).

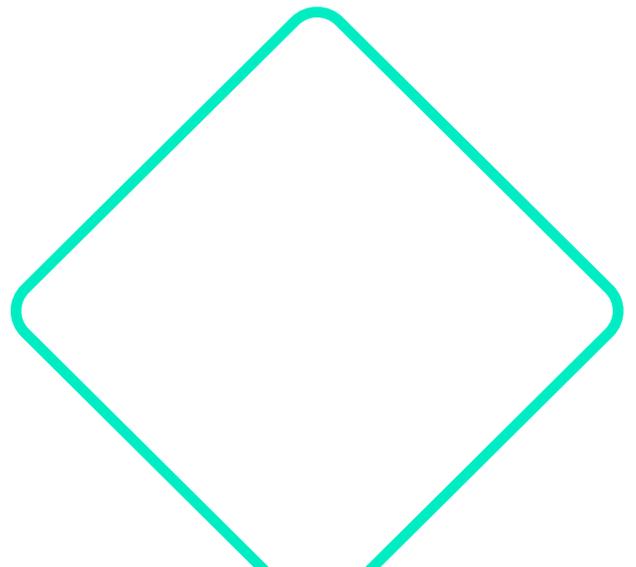
Almost non-existent are residencies (5%), probably because they need more funding and Thai festival organizers are not familiar with them, hence do not realise their benefits yet. Most festivals in Thailand are free events (43%), notable exceptions are performing arts/theatre festivals. For most design and crafts events and some contemporary visual arts ones, the participants are charged fees for marketplace and fair booths or individual exhibitions. Mostly, the funding of festivals comes from turnover from private sponsors or donors (91%) and considerably that from government funding (67%), more than that from ticket and other sales (62%).

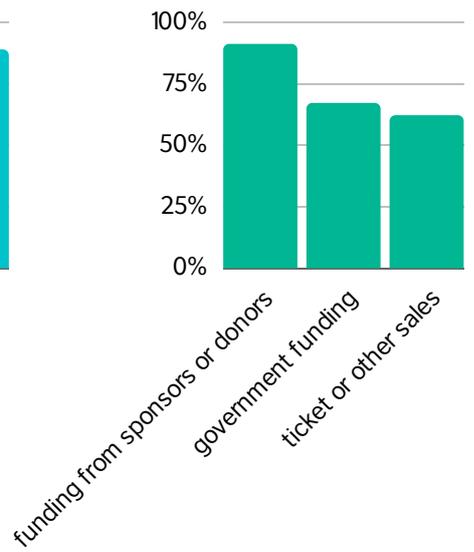
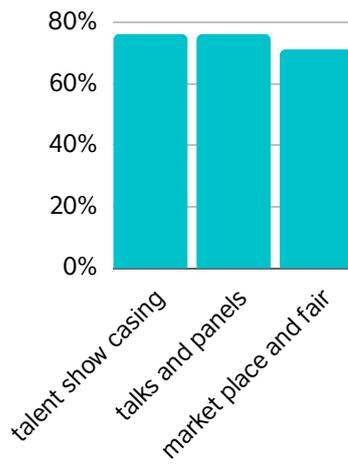
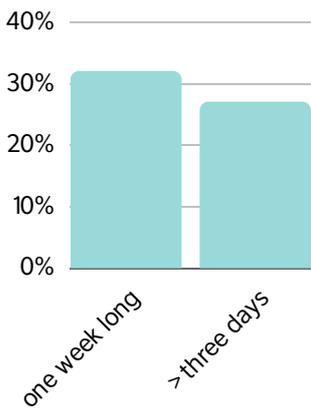
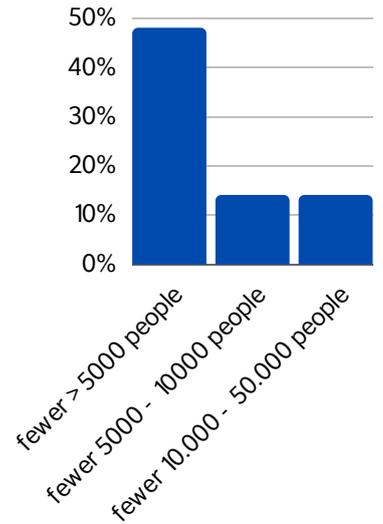
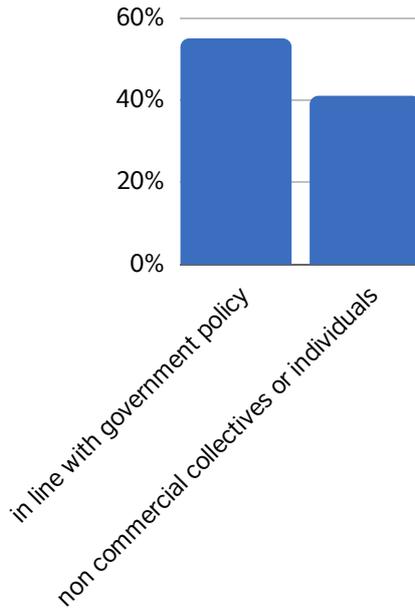
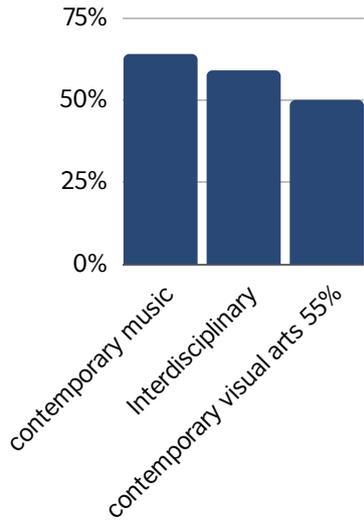
*Image Credit:
Chiang Mai Design Week |
Thailand*



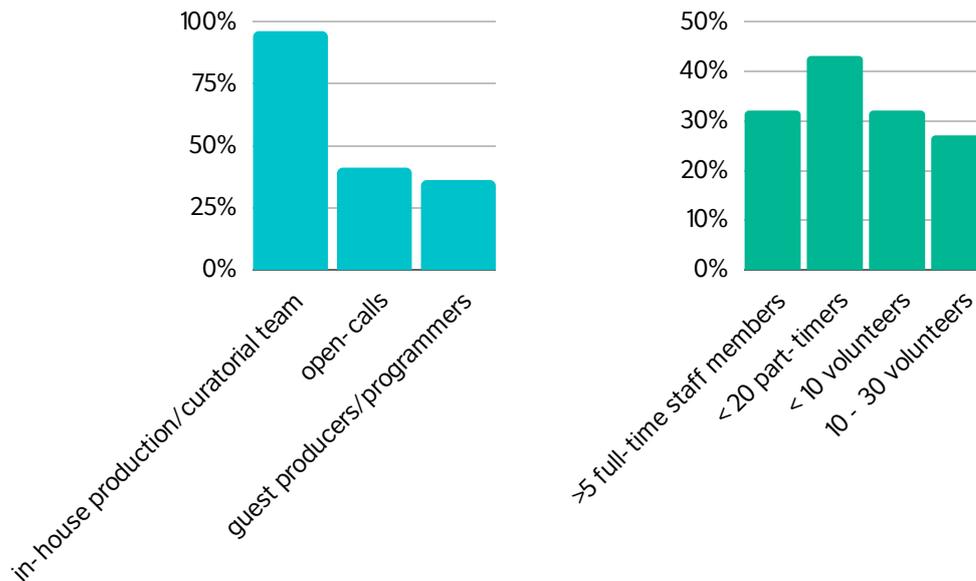


Image Credit:
Chiang Mai Design Week |
Thailand

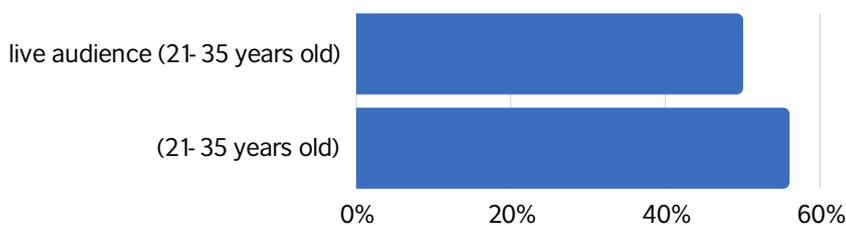




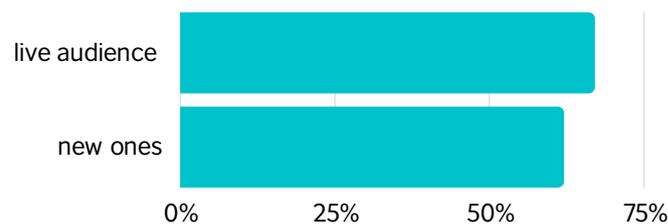
In terms of programming, survey results show that most festivals have an in-house production/curatorial team (96%), some do open-calls (41%) and others are assisted guest producers/programmers (36%). Being small-scaled festivals, many employ fewer than five full-time staff members (32%) while relying on more than 20 part-timers (43%) as well as volunteers (under 10: 32%; from 10 to 30: 27%). It can be said that in this manner festivals in Thailand have been able to build networks of artists and to develop relationships with the locals who take part in the events.



According to the survey results, the average age group of most festivals' live audience (50%) and online audience (56%) is 21 to 35 years old. They are generally sociable, educated, outgoing and have positive thinking towards technology and arts. While many are not art practitioners, they want to be part of it for new experiences, knowledge, or social involvement.



In terms of audience development, survey respondents regard the most important are repeat live audiences (67%) and new ones (62%). At the same time, they hope to open more space for arts/creative professionals along with local audience development for better communities. Deemed the least important by the survey respondents, however, is the online audience.



5.5.2 Gender and Inclusivity

As for gender and inclusivity, it is found that most festivals in Thailand deem them very important among artists and creative talents (52%) and important among staff members and the organizing team (43%). Noteworthy, most festivals have more female than male artists and creative talents and significantly more women than men are in their leadership and management positions. Likewise, most members of their programming/production, outreach and education teams and volunteers are women, and the only male-dominated one is, predictably, the technical support team. Nonetheless, only a few festivals give opportunities to people with disabilities. Moreover, people of ethnic or religious minorities are only involved as artists and creative talents in some festivals, and not as staff members and the organizing team. In other words, while there is balance in gender, inclusivity has a long way to develop for festivals in Thailand.

5.5.3 Festival format

Thailand does not have many large-scale festivals because of its limited budget and public interest in contemporary arts and culture. As a result the aforementioned number of live audiences for many festivals (48%) is lower than 5,000. The larger festivals attract more audiences, but their number is usually lower than expected. Interestingly enough, many festivals attract international audiences from all over the world, notably more from outside than inside South East Asia according to the survey results. This is possibly an outgrowth of the Thai tourism industry (pre-COVID-19 pandemic). According to the survey respondents, during the past three years the numbers of both live audience and online audience of festivals have increased significantly.

It is also found that many festivals in Thailand are not created in the format of online platforms, using it as a marketplace instead for exhibiting or showcasing the works; therefore, their online audience is limited to those interested in purchasing artworks and crafts. Nonetheless, survey respondents note that the popularity of online platforms is constantly increasing among

young audiences via social media. In this time of physical distancing and occasional lockdowns, many discussions or talk panels are presented online, rather than on-site or in a hybrid format.

5.5.4 Festival Development Needs

Findings show that most festivals are considered as very important stakeholders to the growth and development of their creative economy, foremost are artists and creatives (81%); second, commercial sponsors (70%); and third, government funders (60%). In this regard, the collaboration between public and private sectors will enable them to accomplish their missions to grow the creative economy (a very important focus for 60% of them) and to grow cultural capacity (55%), etc. Evidently not a good sign for the development of future audiences, schools and universities are regarded as the least important stakeholders.

Furthermore, the survey results show that most festivals in Thailand are part of other local or regional network(s) (52%) as well as national or international network(s) (52%) of festivals and events. The purposes for their affiliation are: to attain more financial support; to create collaborations between professional teams to develop ideas/concepts of the festival; to create collaboration projects between artists, creatives and local people; to be recognised internationally (e.g. Chiang Mai Design Week in a UNESCO Creative City and as part of World Design Weeks); to support young artists/arts students to present their works on public platforms and to have new experiences; and to build sustainable creative communities of artists and local people. Notwithstanding these, the above number for both levels (52%) means that there are many stand-alone festivals in Thailand without networking at any level. On the other hand, for those networked festivals, expectations include: more funding from donors, investors and government; growth of audiences and participants; collaboration within the South East Asian region and with the rest of the world; collaboration among professional teams; support and promotion of young artists and creative people in all art forms and/or creative genres; increase of income for the festival's longevity;

and exchange of knowledge and projects for artists, students and local people.

As for the future, it is found that next editions of most festivals in Thailand will be approached as they have been (60%) but they will expand to a bigger scale and create more online platforms for their new audience, especially those of younger generations. To achieve this, most festivals put their financial sustainability first and foremost (68%) and strategic partnerships second (63%). A major factor for the festivals, the uncertainty of funding has caused many festivals to change their formats and activities. During the COVID-19 pandemic, very few festivals have been able to adjust themselves while many simply wait and hope things to recover, especially the economic situation.

Finally, to achieve their goals, the festivals in Thailand need the factors and skills shown in the below diagramme:



5.6 Singapore

5.6.1 Overview

In preparing for this research on festivals in Singapore, a long list of 68 festivals were identified according to the five typologies of festivals, a) Traditional rites/rituals, often linked to religion or folklore, b) Crowd Based festivals with contemporary programming of popular art forms, especially music, c) Sector -focused festival to boost industry profile, facilitate networks, build audiences, and support industry development, d) Theme/issue- based festivals. Usually cross art forms and place based, e) Place-based – e.g., City Festival, rural arts festival.



The South East Asia Festivals survey was sent out and quite a number responded but only 33 festivals answered all 48 questions. The festivals who skipped more than three quarters of the survey were omitted to not sway the findings of the survey.

Most festivals not responding to this survey tended to be Traditional rites/rituals festivals such as New Year's celebration, Chinese New Year, Vesak Day, Hari Raya Puasa, Hari Raya Haji, Deepavali and Christmas. Although these cultural festivals involve numerous local partners, and often have beautiful street light-ups, the organising team or business associations tend to be volunteer driven and thus may not have any formal structure of organisation or archiving. Many did not even respond to the email invitation even after a few reminders.

The other groups of non-responsive festivals were either festivals which have ended for good or are going through organizational or management changes such as Art House and Formula One. With the COVID - 19 situation, reflection of festivals' direction and management did not have their top priority.

a. The festivals in Singapore

The 33 festivals in Singapore which responded to this South East Asia Festival survey were from different organisers, venues and of varying scales and duration.

The large-scale festivals include the yearly 1)

Singapore International Festival of Arts (SIFA) (Case Study 1, Annex A), 2) Marina Bay Singapore Countdown, the National Heritage Board's 3) Singapore Heritage Festival, Singapore Night Festival.

The National Arts Council's initiatives of 4)

Singapore Art Week, 5) Got To Move (GTM), 6) Silver Arts Festival and 7) Arts in your Neighbourhood, Design Singapore Council's 8) The Singapore Design Week Venues driven festivals include to the various festivals at the Esplanade - Theatres by the Bay, 9) Huayi Chinese Festival of Arts, 10) Pesta Raya, 11) Kalaa Utsavam – Indian Festival of Arts, 12) Moonfest – a mid-autumn Celebration, 13) Baybeats, 14) Voices – A festival of Song, 15) A tapestry of Music, National Gallery's 16) Light to Night Festival and 17) Gallery Children Biennale, Singapore Chinese Cultural Centre's 18) Cultural Extravaganza. Arts House Limited's, 19) Aliwal Urban Art Festival and 20) Goodman Open House.

Theatre or dance companies driven festivals

like the 21) M1 Singapore Fringe Festival, 22) M1 Contact Contemporary Dance Festival, 23) The Theatre Practice's Patch! A (live) Theatre Festival of Play, Wild Rice's 24) Singapore Theatre Festival and Tworks' 25) Festival of Women NOW-not ordinary work. (Case Study 2, Annex B), The Singapore Book Council's 26) Asian Festival of Children's Content.

Independently run 27) Singapore Street Festival, 28) StoryFest: International Storytelling Festival Singapore, 29) Enabling Festival and 30) The Wicked Wallop. Film festivals by Goethe Institute's 31) German Film Festival, 32) Singapore international Film Festival and Singapore Film Society's 33) European Film Festival (Case Study 3, Annex C).

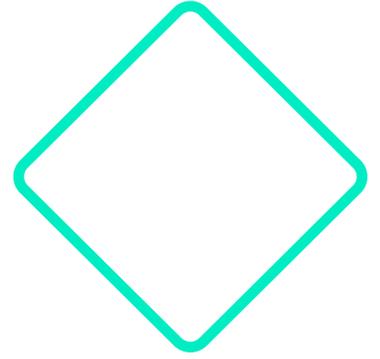
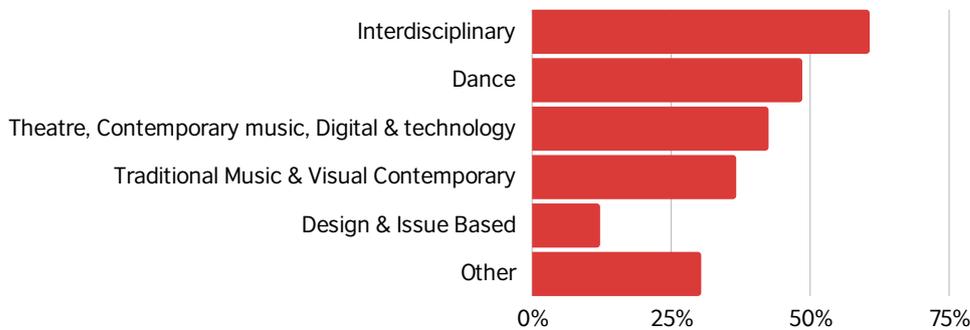


Image Credit:
Singapore Art Week |
Singapore

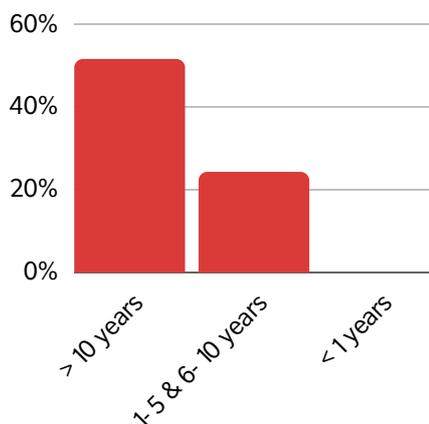


Here are the survey findings of the 33 festivals. Three mini case studies will be given to show the difference in scale and reach of the festivals in Singapore.

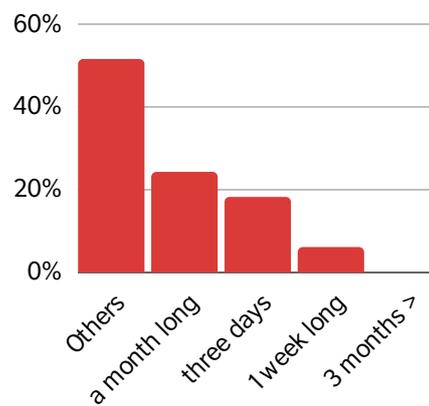
The art form and/or creative genre focus of the festivals in Singapore were: 1) 60.61 % Interdisciplinary, 2) 48.48% dance, 42.42% for three of the categories, 3) theatre, 4) music contemporary, 5) digital and/or Technology, 36.6% for 6) Music – Traditional, 7) Visual – Contemporary, 8) 30.30% Other, 9) 24.24% Visual Arts – Traditional, 10) 18.18% Craft, 11) 15.15% Film/Cinema, 12.12% for 12) Design and 13) Issue Based e. environmental sustainability, LGBTQ, gender, etc. Under the other categories, they include the development of large scale participatory, immersive, and interactive physical artwork installations and online works, popular culture and lifestyle trends, Value of Design, i.e., Design and Business, Chinese opera, puppetry, rare traditional art forms, Skateboarding, Hybrid (Live and digital) Theatre, Literary arts, presentations of Chinese Singaporeans culture through various disciplines, Storytelling and Heritage.



In terms of the age of the festivals in Singapore, 51.52% are 10 + years, 24.24%, are 1 to 5 years and 6 to 10 years, there were no festivals under 1-year-old. Regarding the duration of festivals, more than half, 51.52% were others, 24.24% were for a month long, 18.18% were three days long and 6.06% were about 1 week long. There were no festivals under the categories of 3 months long or longer than 3 months. Under the ‘others’ section, the duration of the festivals ranges from 3, 4, 9, 10, 12 or 17 days, slightly under or up to 2 weeks, 2 to 3 weekends, 2 to 3 weeks or 6 to 18 months.



In Terms Of The Age Of The Festivals In Singapore



In Terms Of The Duration Of The Festivals

30% held their festival once a year, with 60.6% once in 2 to 3 years and 30.3% held multiple times in a year. Three festivals are held annually for 3 weekends over two weeks and other projects. One festival took a hiatus for a review after the Singapore Design Week 2019. The third festival is held twice a year.

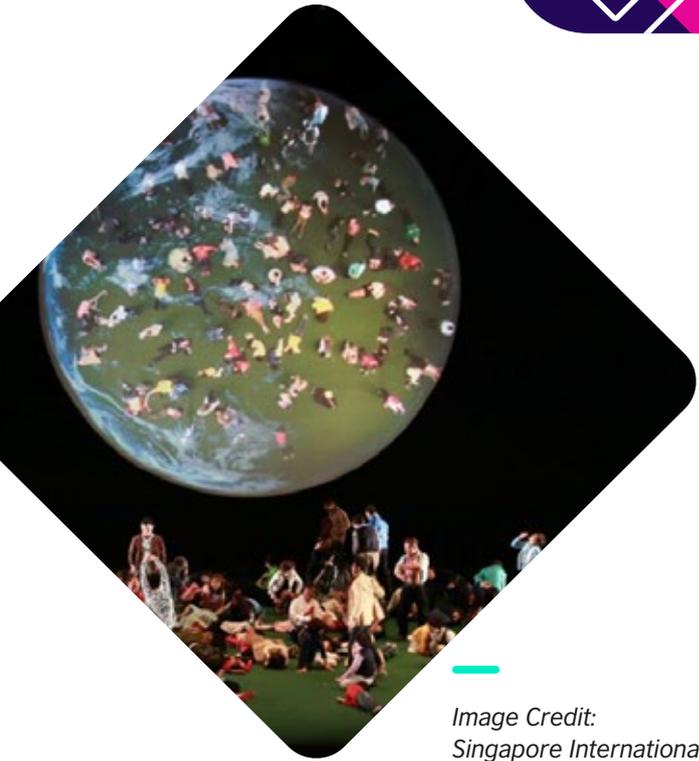
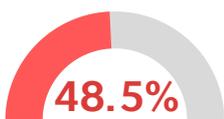


Image Credit:
Singapore International
Festival of Arts |
Singapore

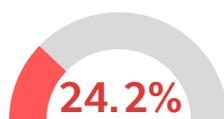
5.6.2 The Structure of the Festivals

In terms of the festivals' legal status, of the 33 festivals in Singapore, 48.48% are organised by Registered foundation/Non-Profit organizations, 24.24% are government owned and 15.15% private-public partnership. 6.06% belong to a) privately owned by commercial entities such as brand or companies or b) privately owned by non-commercial collective or individual.

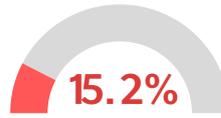
Legal Status of Festivals in Singapore



Organised by
Registered foundation/
Non-Profit organisation



Government owned



Private-public
partnership



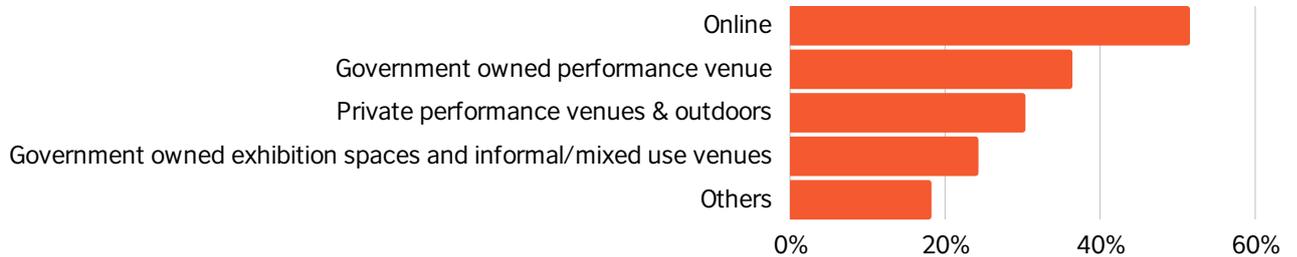
privately owned by :
a. commercial entities
b. non-commercial
collective or individual

The venues where the festivals are presented are quite diverse and visible, with 54.55% Online, 51.52% Government owned performance venues, 36.36% Private Performance venues and outdoors – e.g., Park, beach, or streets, 30.30% Government owned exhibition spaces and informal/mixed use venues, 24.24% other and 18.18% Private Exhibition spaces. Venues are generally quite expensive in Singapore unless there is an in kind subsidy or sponsorship. The details under other includes, regular cinemas, mixture of indoors and outdoors performances and activities all held within a centre, activation of public circulation spaces across the National Gallery Singapore, Shopping Mall Atriums and outside shopping Malls or outdoor parks, Esplanade – theatre by the bay, venues under the National Arts Council 's Arts Housing Framework and the National Library.

Image Credit:
Gallery Children's Biennale |
Singapore



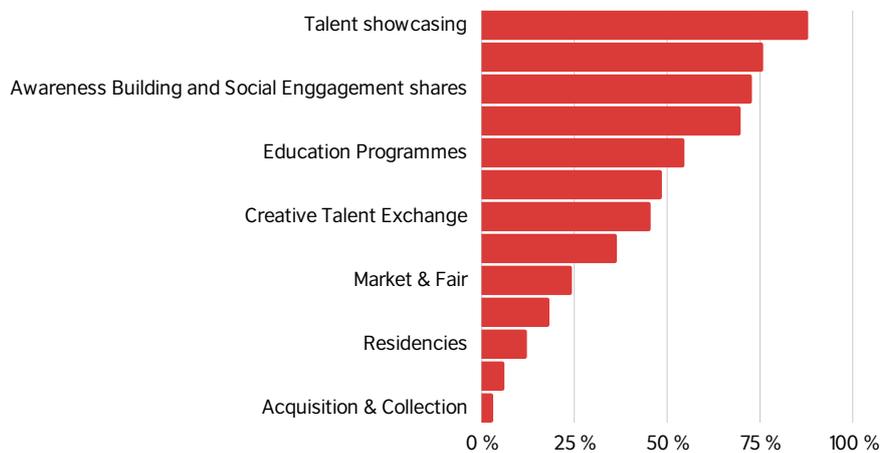
Festivals Venue



As to which are the key parts of the festivals programme, Talent Showcasing tops the list at 87.88%, Commissioning New Artistic Work at 75.76%, Awareness Building and Social Engagement shares 72.73% , Talks and Panels at 69.70%, Education Programmes at 54.55%, Talent Incubation and Development at 48.48%, Creative Talent Exchange at 45.45%, Other Cultural Exchange at 36.36%, Market and Fair at 24.24%, Creative Talent Exchange and Other at 18.18%, Residencies at 12.12%, Research and Publication at 6.06% and Acquisition and Collection at 3.03%.

The other key parts of the festivals programme include learning through play, understanding IP and its legal rights – for production, for performances, for collaboration works, encouraging collaboration between the region, sharing of performing arts from different religions, capability development and Films and songs.

Festivals Programme



As to the how the festival is programmed, 90.91% are by in house production/curatorial team, 39.39% via Open Calls, 24.24% by community/ user -generated programme, 12.12% Other, 9.09% By Guest Producers/guest programmers and 0% by Cultural Provider. The elaborations of the other includes youth new works, how to make it marketable in the mainstream market, Aggregator platform, partnerships with other organisations and festivals and having a festival director.

The number of staff at the 33 festivals are: 48.39% work with under 5 full time staff, 35.48% between 5 to 10 staff, 9.68% 11 to 20 staff and 6.45% 20+ full time staff. In terms of part time staff, 62.50% work with under 5-part timers, 12.50% for 5 to 10, 11 – 20 and 20+ part timers.

In the area of volunteer management, 45.45% of festivals worked with 10 -30 volunteers, followed by 27.27% who don't involve any volunteers and 15.15% who work with under 10 volunteers and 6.06% who work with 30 to 50 volunteers.

75.76% featured a mixture of free and ticketed events while 48.48% were other, 18.18% were free events. 6.06% accounts for the ticketed shows. There explanation given for other includes complex configuration between digital and physical events, talks and digital exhibitions, some workshops chargeable to cover materials, some are ticketed partner events, some a free exhibition within a chargeable exhibition ticket, mixture of free programmes and sponsorship from Shopping malls under the CSR partnership programme including sales of programmes to other festival, 60% ticketed and 40% free, free online programmes while the 'come in person' programmes are ticketed.

Regarding the sources of funding for the festivals, 96.97% are from government funding, 60.61% % turnover from private sponsors or donors, 57.58% % of turnover from ticket and other sales and 36.36% % of other revenue sources. This means that the types of content produced tends to be a little skewed towards government centric themes of building social capital, or nationalistic, inspiring the Singapore spirit or making Singapore home. Arts and Culture as an expression of national identity.

6.3. Inclusivity and Diversity

In terms of how festivals view inclusivity and diversity among the performers and creative talents, 54.55% see it as important, 33.33% Very Important, 12.12% as neutral. In terms of inclusivity and diversity among their staff members and organizing team, 39.39% see it as important, 33.33% neutral and 21.21% Very important and 6.06% see it not important.

The summary of those who elaborated included a conscious programme choice of being diverse to provide accessibility such as Audio Description, touch tours for vision impaired, live captioning or sign language interpretation for the hearing impaired. There was also a mention of targeting the underserved audiences or embracing the needs of diverse audiences in terms of culture, background, language, or themes.

For the Leadership position, festival directors and board members, 27.27% has 51% to 80 %, followed by 21.21% with more than 80%, 18.18%

with 50%, 15.15% at less than 20%, 12.12% at NA. and 6.06% at 20 % to 49%. In the area of Management positions, festival managers, 45.45% are more than 80%, 27.27 % with 51 to 80%, 12.12% at 50 %, 6.06% for less than 20% and 20 to 49% and 3.03% NA. In the programming/ production team, 36.36% are 51% to 80% and more than 80%, 12.12% at 20% to 49%, 9.09% at 50%, 6.06% at less than 20%. In the area of technical support team, 34.38% are 20% to 49%, 21.88% at 50%, 15.63% at 51% to 80%, 12.50% at more than 80%, 9.38% NA, 6.25% at less than 20%.

Regarding the number of disabled people working in the different aspects of the festival, about 19 of the 29 festivals do not work with PWDs (Person with Disabilities) in a concerted way. There are some who work with 1 to 4, while 3 to 10 have either staff or participants who are PWDs. One festival is planning to begin (working with PWDs).

In the area of ethnic or religious minorities who are involved with different aspects of the festival, multi-racial, multi-national and cultural diversity comes up quite a few times.

5.6.3 Festival's Impact and Development Needs

The average size of live audiences per edition of the main festival ranges from 30.30% reaching under 5000 people, to 24.24% reaching 600,000, 18.18% ranging from 5,001 to 10,000 and 10,001 to 50,000, 6.06% 50,001 to 100,000 and We do not know.

In terms of online audience reach, they range from 0 to 300,000 to millions. **It would be interesting to see a more systematic and standardized way of tracking online audiences.**

100% of the 33 festivals are targeted at local audiences. 61.29% are from South East Asian countries, 58.06% from elsewhere in Asia and other international countries outside of Asia. 45.16% are from elsewhere in the country. Considering Singapore to be an island country, this was an interesting reaction to the question.

With regards to the background of the festivals' live audience, 96.88% are arts and creative professionals and 93.75% are the public. There is an equal split between men and women and 30.30% who identified as other. The average age group of the live audience are: 43.75% between 21 to 35 years old, 40.63% between 36 to 50 years old, 3.13% are under 20 or over 50+. The average age for online audiences are similar at 55.17% between 21 to 35 years old, 20.69% (this could have been a mistake), 3.45% under 20 and 50+.

In terms of what is important to the festivals' audience development, 66.67% felt that new audiences were very important, 57.58% felt repeated live audiences and Arts/Creative professional audiences were important. 54.55% felt the online audience was important. 54.55% felt local audiences are very important. 45.45% felt neutral to other Asian Audience and wider international audiences beyond Asia and 39.39% felt neutral to South East Asian audiences.

In the area of audience growth, 54.55% of the festivals saw an increase while 30.30% stayed the same and 15.15% witnessed a decrease. Identifying stakeholders in the growth and development of the festivals, 63.64% felt that Artists and Creatives are very important stakeholders. 63.64% are neutral to Politicians and Representatives, 60.61% felt the Media and Critics are important, 56.25% felt Universities are important, 50% felt the local community leaders are important. 48.48% felt that Arts and Creative professionals, other festival peers and Schools are important, 45.45% felt the Government funders are very important. 45.45% felt that Non-profit funders are important, 42.42% felt that commercial sponsors, e.g., brands and companies are important, 36.36% felt that individual donors and audience are important.

The themes that drives the festivals are: 51.52% felt it was very important that festivals build local pride, 51.52% felt it was important to grow the creative economy, 45.45% felt important that festivals can grow cultural capacity, 42.42% felt important to build tolerance and inclusion, 40.63% felt neutral to build environmental awareness, 37.50% felt neutral to provide employment, drive innovation across the economy and provide opportunities for minority

communities, 33.33% felt either not a focus or neutral that festivals can grow and enhance tourism, 31.25% felt neutral to attract inward investment.

The top three themes that raised discussions with stakeholders in the public sector are: 66.67% grow cultural capacity, 51.52% build local pride and 48.48% grow the creative economy. This is an exciting direction for Singapore to become experts in consolidating its festival experience to deepen cultural capacity, articulating the diverse Singaporean identities, and attracting the best talents to grow the creative economy in art and technology incorporating the latest trends of AR and VR in interactive arts and culture experiences. At least two festivals spoke about the need for connection to life and responding to the needs of the underserved.

The top three themes that raised discussions with stakeholders in the private sector are quite similar as 60.61% grow cultural capacity, 48.48% build local pride, 45.45% build tolerance and inclusion. It is good to see the heart of private corporations in fostering tolerance and inclusion for the local communities.

Links of Singapore festivals to regional networks are quite lacking. 57.58% are not connected in any way, 42.42% are connected in some way and 30.30% chose others. The festivals tend to be linked to ICOM, Association of Asia Pacific Performing Arts Centre, Esplanade's own series of festivals, informal network of festival programmers in Singapore, cultural embassies like the Goethe Institut. Similarly, 54.55% are not a part of any national or international network of festivals 42.42% are a part of some international network and 39.39% are connected through others. Links include ICOM, CIMAM, the International Battle of the Year in Germany, BBIC in Korea, Freestyle Session from USA, International Federation of Interior Designers (IFI), International Society of Performing Arts, Singapore Art Week, Global Association of Literary festivals, European Festival Association, Luma.

The top three benefits for being a part of the international networks are 45.45% Expanded Network and Access to an international Community of Practitioners, 39.39% Availability of Industry information and Exchange.

The plans for 2022 are 50% will change the festival model, 31.25% will continue as previously planned and follow similar operational plans before COVID19 and the remaining have yet to make any plans.

5.6.4 Festival Development Needs

60.61% felt Intellectual Property skills are the most important, 48.48% felt leadership effectiveness, 30.30 % felt business planning, 27.27% felt Human Resource Development/team capacity building and Brand Development skills and Audience building skills and 24.24% digital skills.

In a five-year projection, what are the priorities for the festival? 54.84% identified event management, 43.75% event production, programming, and curation, 37.50% strategic partnership development and stakeholder relationship development and management and 35.48% artistic liaison.

In future projecting festivals to 2026, 68.75% felt it is very important to focus on Audience Development, 61.29% felt neutral to environmental sustainability, carbon neutral, 60.61% felt it was important to have programme diversification, 57.58% felt it is very important to have strategic partnerships, 50% felt it is very important to develop digital capacity, 46.88% felt it is very important to have team capability building/upskilling, 46.88% felt it is important to improve inclusion and diversity, 45.45% felt it is important to have effective management/governance, 43.75% felt it was important to have talent development and incubation, 36.67% felt neutral to tour the festival to other places, 36.36% was divided between important or very important to have financial sustainability, 36.36% felt neutral to have business development /growth, 32.26% felt neutral to infrastructure building and

enablement, i.e. SG Connections. 32.26% felt neutral and important for socio-political stability.

5.6.5 Challenges for 2026

Sponsorship, keeping up with technology, better understanding the audiences and manpower resourcing are some of the mentioned challenges. More than half of the 33 festivals were able to identify the barriers to achieving the changes. Navigating the unpredictable COVID-19 restrictions, economic climate, cost, limited pool of funders and financial resources, staff capability in developing strong programmes and networks.

5.6.6 Recommendations

Firstly, in the spirit of more inclusivity and diversity, more independent and decentralised Festival organisations are needed in Singapore. The majority of the 33 festivals in Singapore are either state driven, i.e., the national festival (SIFA) or national institutions driven (National Arts Council, National Heritage Board, National Gallery), non-profit venues (Esplanade with several festivals throughout the year, Arts House Limited) who receive funding from the state or are highly curated, bringing to question the lack of independent spaces for self-expression.

Second, more clarity needs to be established in the guidelines or strategies by the festivals to include women and PWDs in the organizations, programming, and access for audiences to the festivals.

Third, there needs to be a major shift of funding expectations from government to corporates and foundations. From the Singapore Cultural Statistics 2020, the increase of government funding from \$458.66 m in 2018 to \$495.86 m in 2019 saw the increase in the Cultural Matching Fund from \$ 43.7 m in 2018 to \$49 m in 2019. The cash and in-kind donation fell slightly from \$63.9 m in 2018 to \$56.9 M in 2019. However, the Artefact donations increased from \$1.2m in 2018 to \$ 2.8m in 2019. More needs to be done to convince corporations and foundations to play a more active role to channel their CSR budget and networks to the arts to benefit the communities and society.

Fourth, a more rigorous, systematic, and standardised way of tracking online audiences. In this emerging increase of online performances and festivals, how can we better track the engagement and growth of audiences?

Fifth, despite the unexpected COVID pandemic, how can South East Asian festivals collaborate to change the mindset of festival organisers and audiences to better appreciate the richness and diversity of South East Asian Culture.

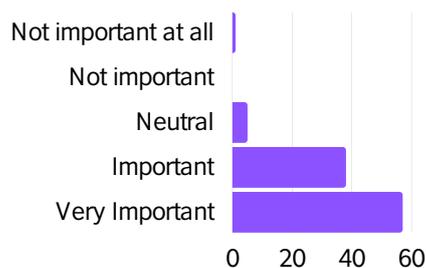
Sixth, it is important for festivals in Singapore to think deeply about environmental awareness as Singapore seeks to achieve the Singapore Green Plan 2030.

Seventh, festivals need to start building more bridges with other sectors and industry to grow the creative economy, grow cultural capacity and drive innovation across the economy to grow and enhance tourism and attract inward investment to be sustainable as a city of festivals throughout the year.

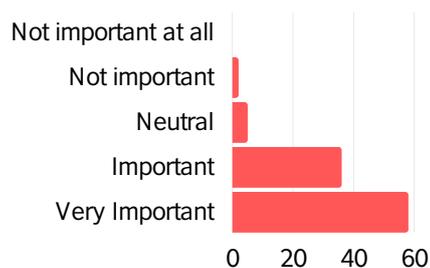
Finally, returning to the capacity of festival organisations, several festivals have articulated the need for digital literacy, seeking collaborations with partners and constant development for staff in the areas of inclusive programming and organisation of sustainable festivals.

Chapter 6 General Recommendations

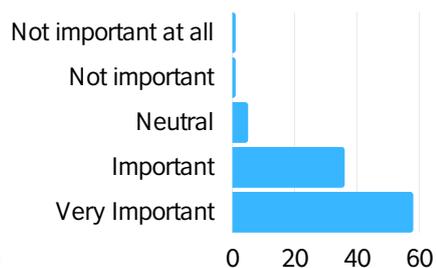
How Important Are The Followings To Help You Achieve This Change By 2026?



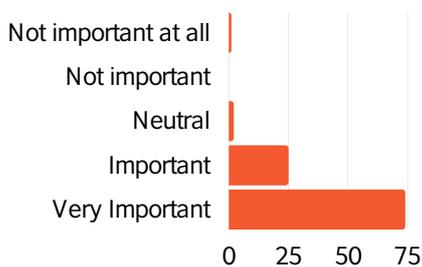
Audience Development



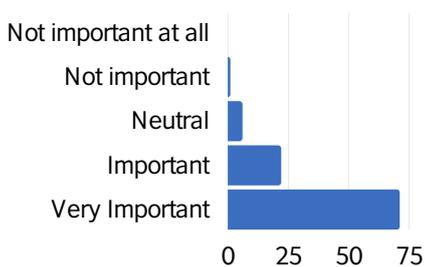
Team Capacity Building/Upskilling



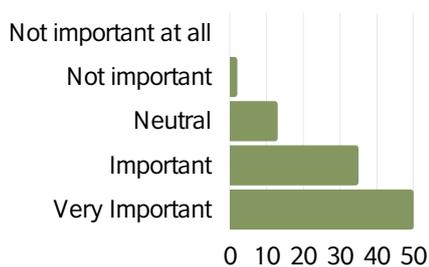
Effective Management/Governance



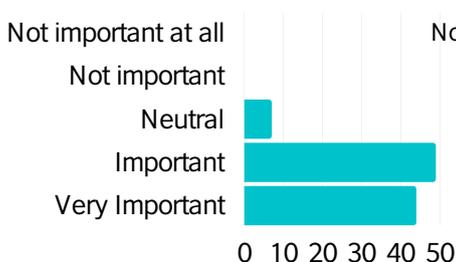
Strategic Partnership



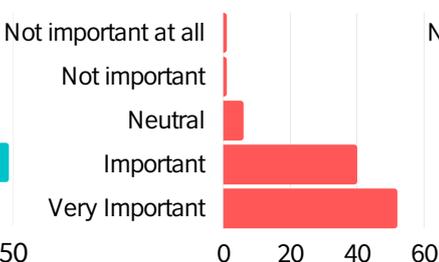
Financial Sustainability



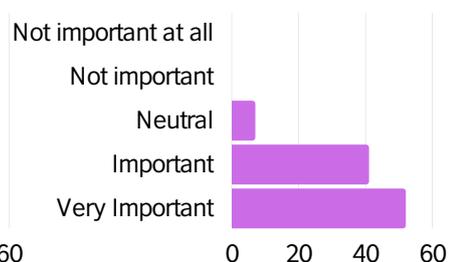
Business Development Grow



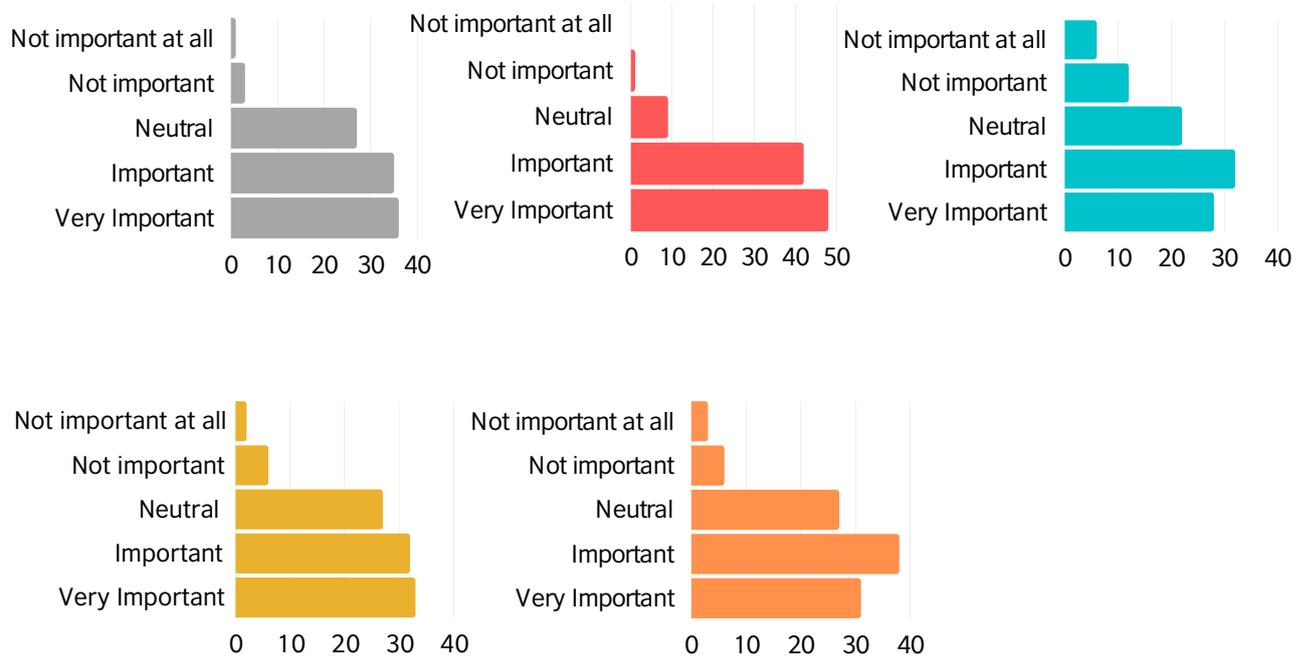
Programme Diversification



Talent Development & Incubation



Develop Digital Capacity



Core function development: Such as festival management capacity, production management capacity; Business planning skills, leadership effectiveness and team capacity are on the top business development needs.

Support function development: These are needs such as organizational management, human resource management, and to boost marketing, promotion and data analytics skills.

Network Expansion: There needs to be more access to global networks and opportunities for involvement abroad. Strategic partnerships are important for festival sustainability and growth. This includes partnership with Government, education providers, the wider cultural sector (e.g. museums), and with enterprise.

Investment: The government can invest in festivals beyond tourism purposes. Festivals require investment which enables them to lead on programming, to commission new and often radical work, and thus create compelling platforms, catalysts for innovation and change in the creative economy.

Other needs include, financial support, and needs to change or reformulate government policies and mechanisms to strengthen the creative economy.

Summary

1. The Role of Festivals in The Southeast Asia's Creative Economy

With many urbanized locations, Malaysia Festivals have linked directly with so-called creative hubs. These arrangements are closely knitted with place-making, urban planning, and a new participative paradigm of thinking about the urban future. This includes involvement with government or government initiated programmes on creative economy, contemporary issues as well as cultural heritage preservation. Malaysia also mentioned developing a creative economy in the array of their aspirations.

In the Philippines, creative hubs are viewed as safe spaces for creative expression and exchange, also as platforms for inclusive growth. The role of festivals here is to raise awareness of the arts and cultural sector as a means to build stronger communities and to breed pride of cultural heritage and responsibility towards it. They are also critical connectors between grassroots cultural activity and the more commercially facing creative industries.

In Vietnam, Design hubs are mentioned as the avenue of interactions between festivals with creative economies, and opportunities to collaborate on government works, which includes support of emerging and young artists/art students in presenting their works on public platforms, gaining experience; and to build sustainable creative communities of artists and local people.



*Image Credit:
Singapore Night Festival |
Singapore*

2. Path from festivals to creative economy

How do festivals bolster and contribute to the creative economy? The following are two models or perspectives to map out the mechanics. These models are constructed from the data accumulated from the questionnaires and case studies.

Each element in the models are numbered for easy reference.

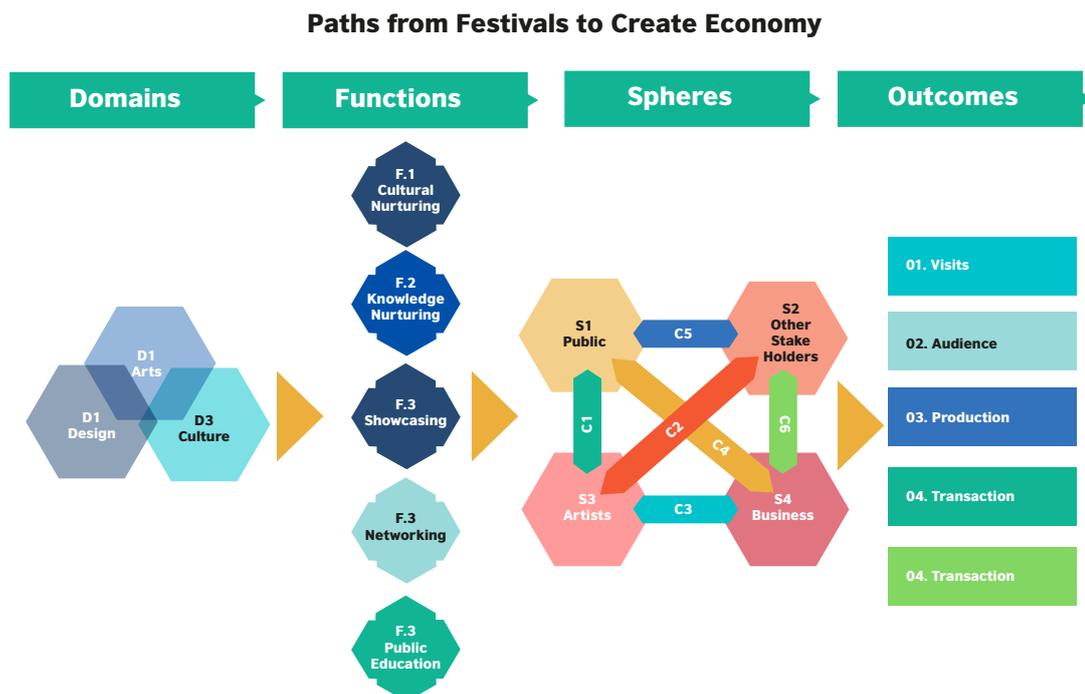
MODEL 1

In this model, three sector domains are identified namely Arts (D1), Design (D2) and Culture (D3). Any festival deals with entities inside these three domains. It can be music, dance, literature, fashion, etc.

There are some identified functions of the festivals. Cultural Nurturing (F1) is for example the preservation of heritage, revitalization of certain traditions. Knowledge nurturing (F2) can be in the form of discussions, research, publication, and artist exchanges or residences. Showcasing (F3) can be done in the form of exhibitions, marketplace, etc. Networking (F4) usually brings together actors from different places or different roles. Public education (F5) is usually aimed to change the behavior or raise the awareness of the public.

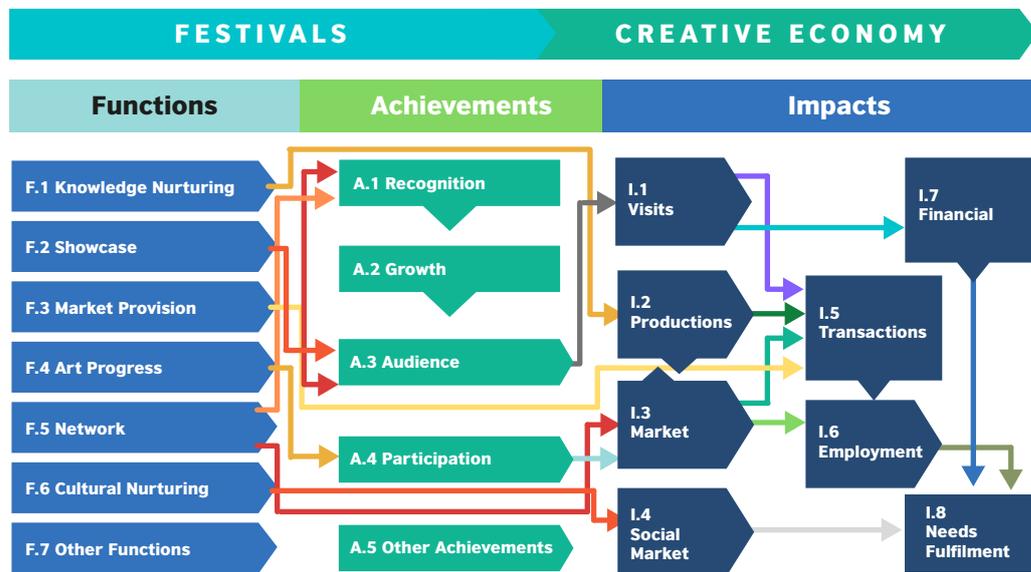
The spheres map the main social interaction endeavors in where the function is to connect or mediate. These spheres are Public sphere (S1), Other Stakeholders Sphere (S2), Artist Sphere (S3), and Business sphere (S4). Between these spheres are the connections C1 to C6. In this diagram, for example a festival that works on music performances in the rain forest tries to raise awareness of the environment, is D1, F5, C1.

The Outcomes of the whole festival can be seen in O1 to O6.



MODEL 2

The following model illustrates the relationship of festivals to creative economies:



This model describes the mechanism from function of the festival, to what the festival had achieved, and to its impact to their surroundings.

The functions here are actually similar to functions in model number 1. The Function F4 (art progress) is a term to describe efforts to bring advancement to the art itself. The function F3 is an effort to facilitate the market of either works of art, culture, or design.

The achievements sometimes interact with each other such as when a festival grows (A2), then gets more recognition (A1), yet the more it is recognized, the more it has potential to grow.

The lines connecting the elements here are the possible paths of how festivals contribute to creative economies.

The arrows placed in this diagram are for general illustration of possibilities, new arrows are possible depending on the case of each festival.

The models are separated into two models due to space constraints in drawing a diagram, the models can be merged into one diagram but the picture will be very large.

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