

CEA OUTLOOK

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05

THAILAND'S VISUAL ARTS INDUSTRY

Creative Economy and the Development of Visual Arts Industry

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About CEA

In accordance with the Royal Decree effective as of 14 August 2018, Thailand Creative and Design Center (TCDC) has been reestablished as the Creative Economy Agency (Public Organization) under the Office of the Prime Minister of Thailand. The Creative Economy Agency (CEA) is tasked with engaging with entrepreneurs whose businesses leverage innovation and creativity tools to offer products and services that enhance the prominence and competitiveness of Thailand's intellectual property on the global market.

To that end, the CEA uses a variety of approaches to help make creative and digital economy development a pillar of our national future. Through the provision of timely and useful data, the CEA assists in the formulation of policy whilst also establishing creative districts where the government's agenda can be put into action. The CEA also offers training and support to aspiring creatives in conjunction with educational institutions and private sector entities at TCDC branded business incubation centers, where future luminaries of the Thai creative economy can make a start for themselves.

Additionally, the CEA also serves as a repository of statistics and information that can be leveraged by domestic and international stakeholders seeking to help make Thailand a leader of creative economy in the twenty-first century.

Volume **05**

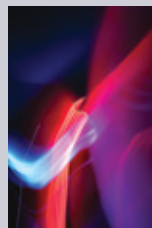
THAILAND'S VISUAL ARTS INDUSTRY

Creative Economy and the Development of Visual Arts Industry

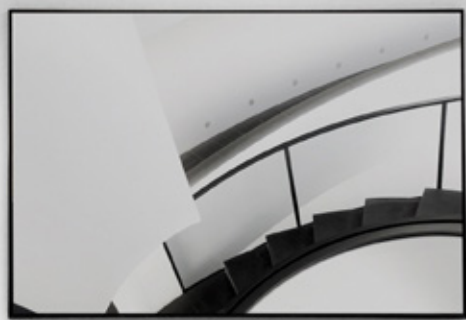
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PREFACE

Visual Arts are considered one of the most ancient art forms alongside humanity, starting from the prehistoric pigments cave paintings. The paintings are the science and art of recording history since the past, then they are expanded through ages, from the dark age to the renaissance. Visual Arts, therefore, have been helping to shape the human minds, nourish people at the time of adversity and crisis. Until now, the visual arts industry is obtaining opportunities, as well as confronting challenges all around.

The visual arts industry is one of the 15 creative industries in Thailand that has potential with continuously expanding economic value from 18 billion baht in 2014 to 23 billion baht in 2018. Despite the severe pandemic of COVID-19 that causes the recession, however, the ever-evolving power of creativity has allowed us to witness new inventions in the visual arts industry, such as accessing visual arts through virtual technology and digitizing objects for trading on the NFT market.

Creative Economy Agency (Public Organization) or CEA, as the agency designated to promote Thailand's creative economy, wishes to create awareness,

comprehension, and sustainable solutions for the creative economy. As a result, it has researched the creative economy by category, which covers the overall context, stakeholders, business model as well as operational problems to collect and present as a plan for the development of each branch of creative industries as a guideline for the development of Thailand's creative industries and the enhancement of Thailand's competitiveness.

This CEA Outlook vol.5 illustrates the analytical results and worth-mentioning issues from the report of strategic plans for visual arts industry development, along with the relevant references. The results are presented by covering diverse topics context of visual arts, statistical data, entrepreneurs' potential and competence analysis, major trends in the visual arts industry, the successful international cases, as well as examples of the visual arts industry abroad as the guidelines to be applied in Thailand's creative industry. The study, therefore, helps formulate a strategic plan to be in line with the country's policy which will lead us to the sustainability of the nation's visual arts industry development.

APISIT LAISTROOGLAI

Executive Director,
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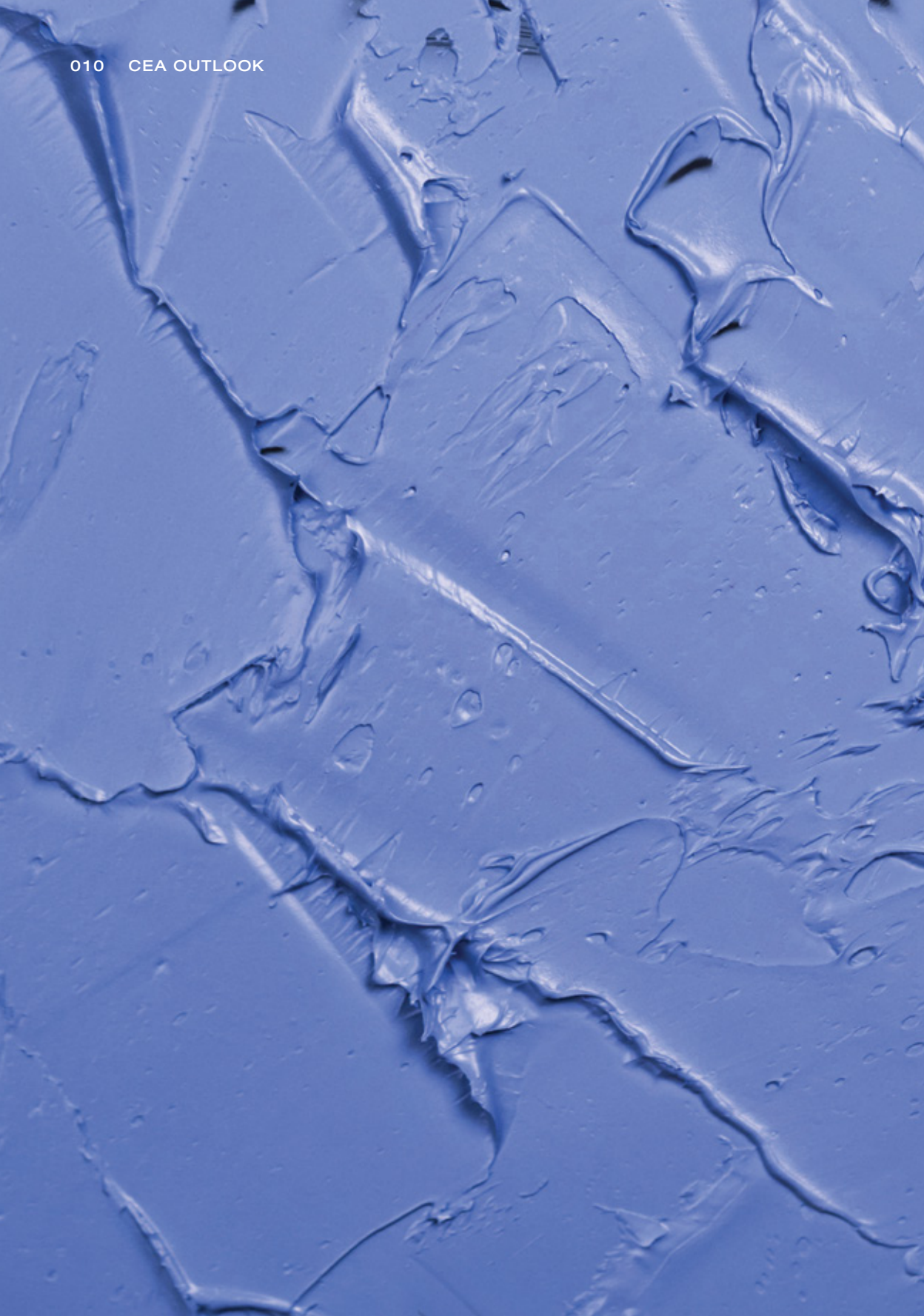
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SECTION

01

**Creative Industry
in Visual Arts**

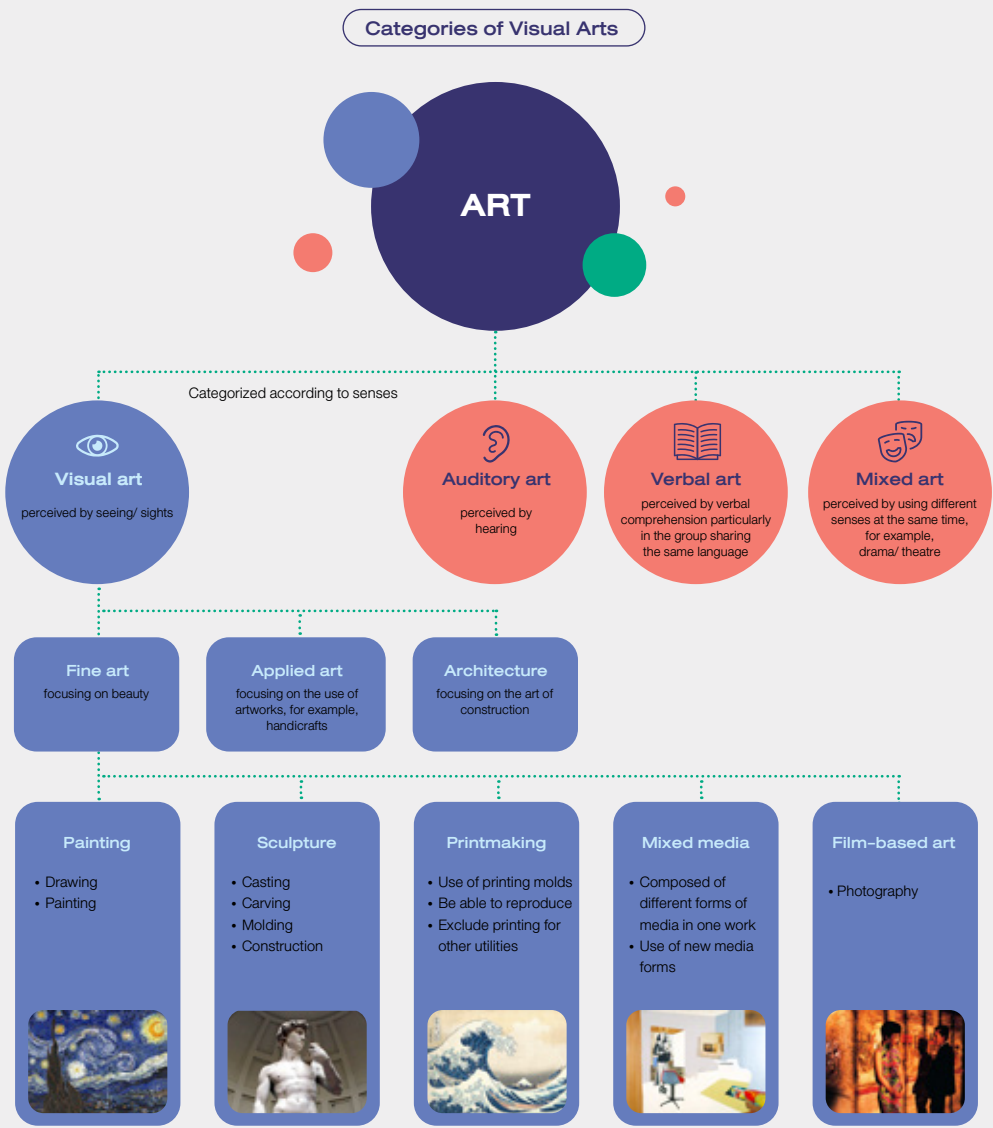
Each category of creative industry has different forms of operations, challenges, and limitations. To determine appropriate and effective development plans for entrepreneurs, it is essential to prepare the ground of data regarding current situations, business challenges, and issues affecting the operation. Hence, CEA has constructed the database of management projects and development plans for each category of creative industry to study and to collect all statistic data to build up the industry database structure. This 5th CEA Outlook proposes the analysis of potentiality and capability of entrepreneurs in visual arts creative industry, facilitation guidelines, and efficient measures to determine the strategic plans in compliance with government policies. Moreover, this will lead to the implementation of the development plans in a hope that it will bring benefits for entrepreneurs in the visual arts industry.

Definition of Visual Arts Industry

The definition of "visual arts" in this study has been compiled and analyzed from national and international organizations and experts in the industry. The definition of visual arts is assigned by referring to the main four selected sources as follows: (1) Britannica English Encyclopedia, (2) Texas State Art Center: The Old Jail Art Center, (3) Visual Arts Criticism by Assistant Professor Supachai Singyabuth, and (4) Royal Thai Institute Dictionary. It can be concluded that the definition of visual arts demonstrates five important characteristics including: (1) human-made products in two- or three-dimensional forms; (2) means to deliver emotions, feelings, ideas, or tastes; (3) expressions of skills or imaginations; (4) expressions by means of art objects; and (5) communication perceived by sight or visualization. It can be concluded that "visual arts are a branch of arts which artists express their emotions, feelings, ideas, tastes, or skills through art objects and audiences receive the message through sights (or touching)".

Categorization in Visual Arts Industry

There are several categories of visual arts. The followings are the categories of visual arts as appeared in the textbook of the Faculty of Fine and Applied Arts, Mahasarakham University.



From the above figure, it is apparent that visual arts are a branch of arts perceived by sights to receive the message through the art objects. Visual arts can be divided into three categories:

Fine Art



Art objects created with an objective of appreciation on the artistic beauty.

Applied art



Art objects that can be applied so that they have other utilities other than their beauty such as handicrafts which are beautifully designed equipment or magazines which are used to communicate information to readers with beautiful design.

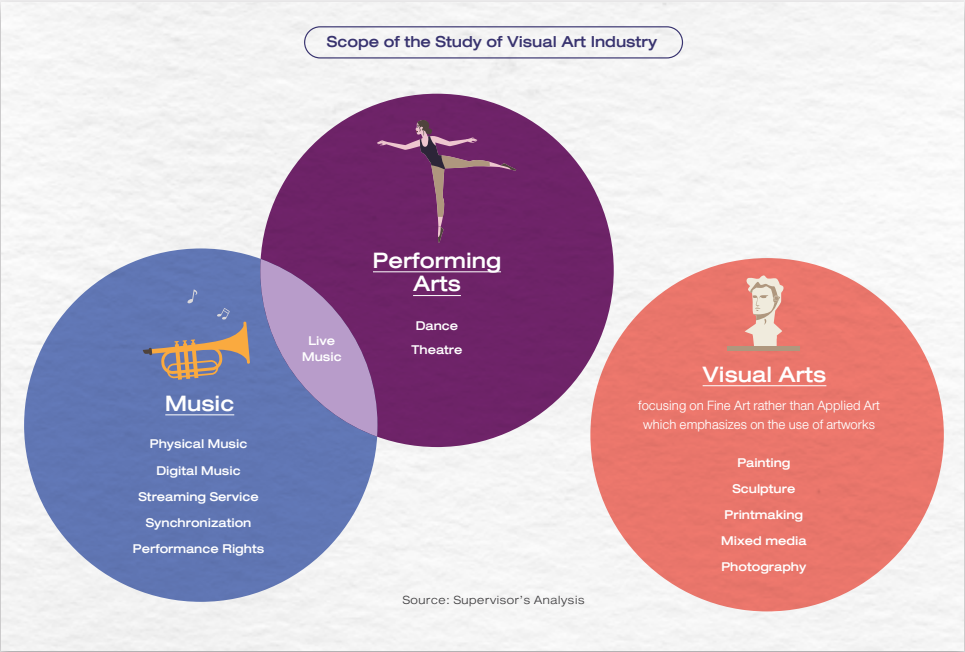


Architecture

Designs of structures and buildings for living or other purposes; the beauty of which is received through sight as well.

Scope of the Study of Visual Arts Industry

This study aims to establish development plans for creative industry particularly in visual arts; the scope of which mainly focuses on visual arts industries that are capable of developing and creating further economic value. This study seeks to obtain a clear study framework that will lead to appropriate and efficient facilitation guidelines so that the data can be used to determine strategic or operational plans in compliance with government policies as well as to implement the development plans into practice.



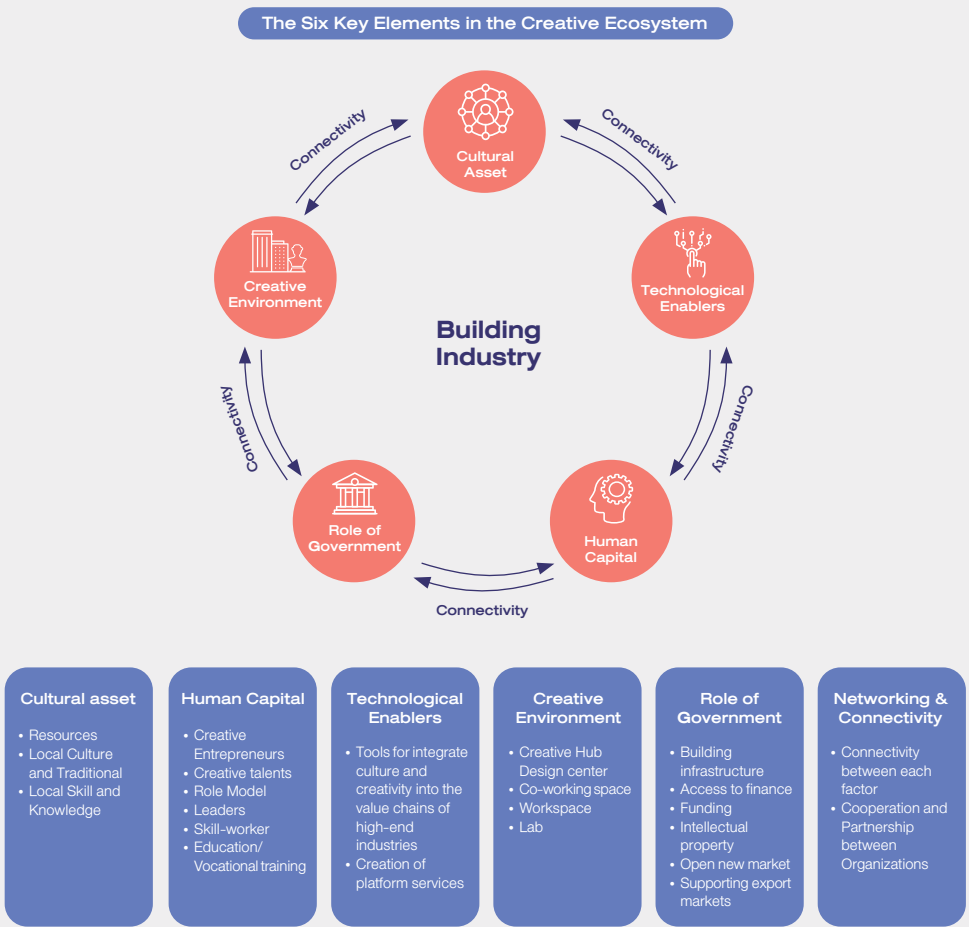
This study is the accumulation of other studies to construct the database and the development plans for creative industry in three categories – music, performing arts, and visual arts. From the aforementioned categorization of visual arts, the scope of

the study emphasizes on the study of visual arts under the umbrella of fine arts. Fine arts cover the art objects including painting, sculpture, printmaking, mixed media, and photography.

The analysis and establishment of the industry development plans for each category – music, performing arts, and visual arts are on the ground of two main frameworks as follows: (1) main factors affecting development of creative industrial ecosystem and (2) Porter’s Value Chain Analysis Framework. The study aims to investigate the data of creative industry development

guidelines from six organizations involving in facilitation of the industry. Two main focuses include environmental development contributed to the driving of creative industry, and entrepreneur development for creative industry. The data obtained from the investigation of guidelines from those organizations can be concluded as follows:

1. Analysis of the Six Key Elements in the Creative Ecosystem



Source: World Economic Forum, UNCTAD, CEA’s Framework for Creative Industry Development and Supervisor’s Analysis

1. Cultural Asset

Cultural capital or cultural asset is the essential factor for development and value adding of products and services, especially the creative industry group called “Creative Originals” who have brought social and cultural contexts into the creation of products in various forms. Therefore, a country with prosperity of cultural capital will have great advantages over other countries in development of products and services in creative industry.

2. Human Capital

Human capital is another profound factor affecting the development. Creative products are created from aptitude, knowledge, proficient craftsmanship skills, and analysis & synthesis skills to create new products and services, especially, the creation from “Creative Originals” which is usually imparted from generations to generations.

3. Technological Enablers

The development in innovations and technology is a fundamental factor to add value and enhance creative industry development. It puts some direct and indirect impacts on the industry’s entrepreneurs as well as development of tools and equipment to create more sophisticated and innovative products to gain attention and respond to customer’s demands. It also serves as a channel to distribute and promote product sales which will broaden opportunities for entrepreneurs and manufacturers to reach to their customers.

4. Creative Environment

Environment or creative space are another significant external factor in the process of work creation in creative industry. Appropriate environment is crucial for learning and encouraging creative ideas such as the development of a creative community or neighborhood that is open for designers and entrepreneurs to share and exhibit their creative works and products. When creative people gather, there will always be exchanges of personal experiences, points of view, and attitudes among the group.

5. Role of Government

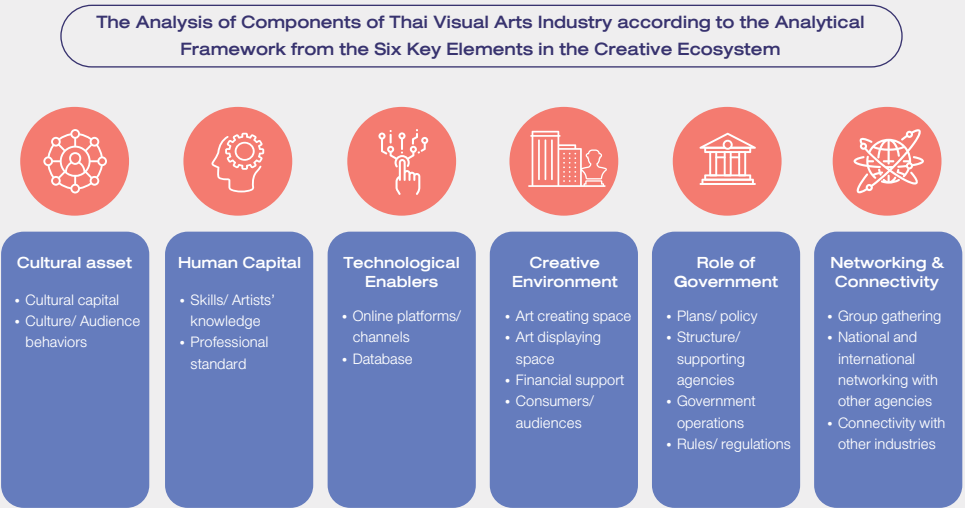
In creative industry, there are adoptions of different principles and process from other types of industry. The government should recognize and perform the supportive roles in providing assistance to create activities which will benefit entrepreneurs and staff working in the industry. This includes financial and investment supports in activities that are essential to the development of the industry. There should also be provision of knowledge to entrepreneurs and staff and supports in other related sections such as investment in infrastructure, knowledge and understanding regarding intellectual property, and export of highly potential products to set examples for other entrepreneurs in the industry.

6. Networking / Connectivity

Connectivity between network and interaction among groups of people, from upstream to downstream, in the value chain are essential factors contributed to the development of any industries. Nowadays, there have been high competition of marketing, technology changes, and customers' demand and taste, so it is a big challenge for entrepreneurs to maintain their advantageous position in the competition or run the business solely by themselves without any connections. The entrepreneurs in the industry must initiate cooperation and strong relationship with other businesses which also take vital roles in the market competition. Some of these businesses include suppliers, distributors, creators, exhibition venues, and customers, not to mention organizations and personnel taking supporting roles in business administration.

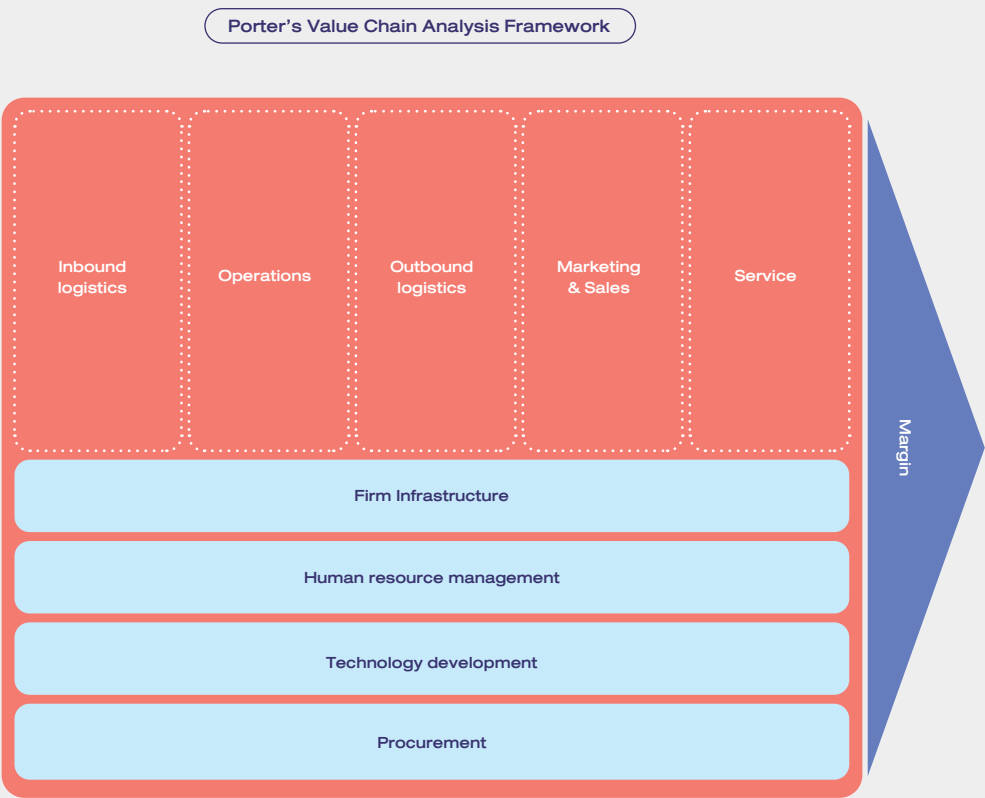


The six key elements in the creative ecosystem are investigated in order to analyze data regarding current situations of each industry and other related issues in each factor. The analysis is based primarily on the Thailand's contexts. The data of Thai visual arts industry can be concluded as follows:



2. Porter’s Value Chain Analysis

Apart from the six key elements in the creative ecosystem presented earlier, this study also adopts Porter’s Value Chain Analysis framework to analyze the value chain in the industry to understand the value making process of each industry including industry stakeholders, occurring activities, and challenging issues in the process.



Value Chain Analysis Framework is usually adopted to analyze activities in an organization. Activities can be divided into two levels which are primary activities and supporting activities. Primary activities are activities involving production, products or services creation, marketing, and product and service logistics to customers. Logistics includes 1) Inbound Logistics referring to receiving or transportation, storage, and distribution of raw materials before being processed; 2) Operation referring to raw materials being processed into products or services including production process and packaging; 3) Outbound Logistics referring to storage, collecting, and distribution of products or services to customers; 4) Marketing and Sales referring to the inducing of sale and purchase including advertisement and distribution channels; and 5) Services referring to a service provided to add value to the products or after-sale services.

Supporting activities refer to activities that help the primary activities in creating advantages and efficiency. Supporting activities comprise of four main activities. 1) Firm Infrastructure including accounting system, financial system, organization administration, etc.; 2) Human Resource Management referring to organization's human resource management including job analysis, recruitment, evaluation, training and skill development, etc.; 3) Technology Development referring to technology development that assists in value adding or products and services production process development; 4) Procurement referred to procurement of input such as raw materials or machinery for primary activities.

Industry value chain is indeed similar to the overview of value adding process in industry level. There are some steps of activities which public or private organizations usually involve in each process. By adopting this framework to analyze the development plans for creative industry in visual arts, the researcher would gain profound understanding of the value adding process and all activities occurring in the industry.

Policy Study in Music, Performing Arts, and Visual Arts Industries

Thailand has determined the national economic movement driven by creative economy system in a hope to make use of its strength in cultural capital to push the national economy forward. Integration of knowledge and innovations has been an attempt to add value to products and services in music, performing arts, and visual arts industries. The literature review on policies regarding creative industry

development in the aforementioned categories from government organizations is hence essential to achieve the development of plans and database of each category of the creative industry since they have contributed to the effective movement of Thailand's development nowadays. The data from the study have been accumulated by examining four development plans and policies as follow:

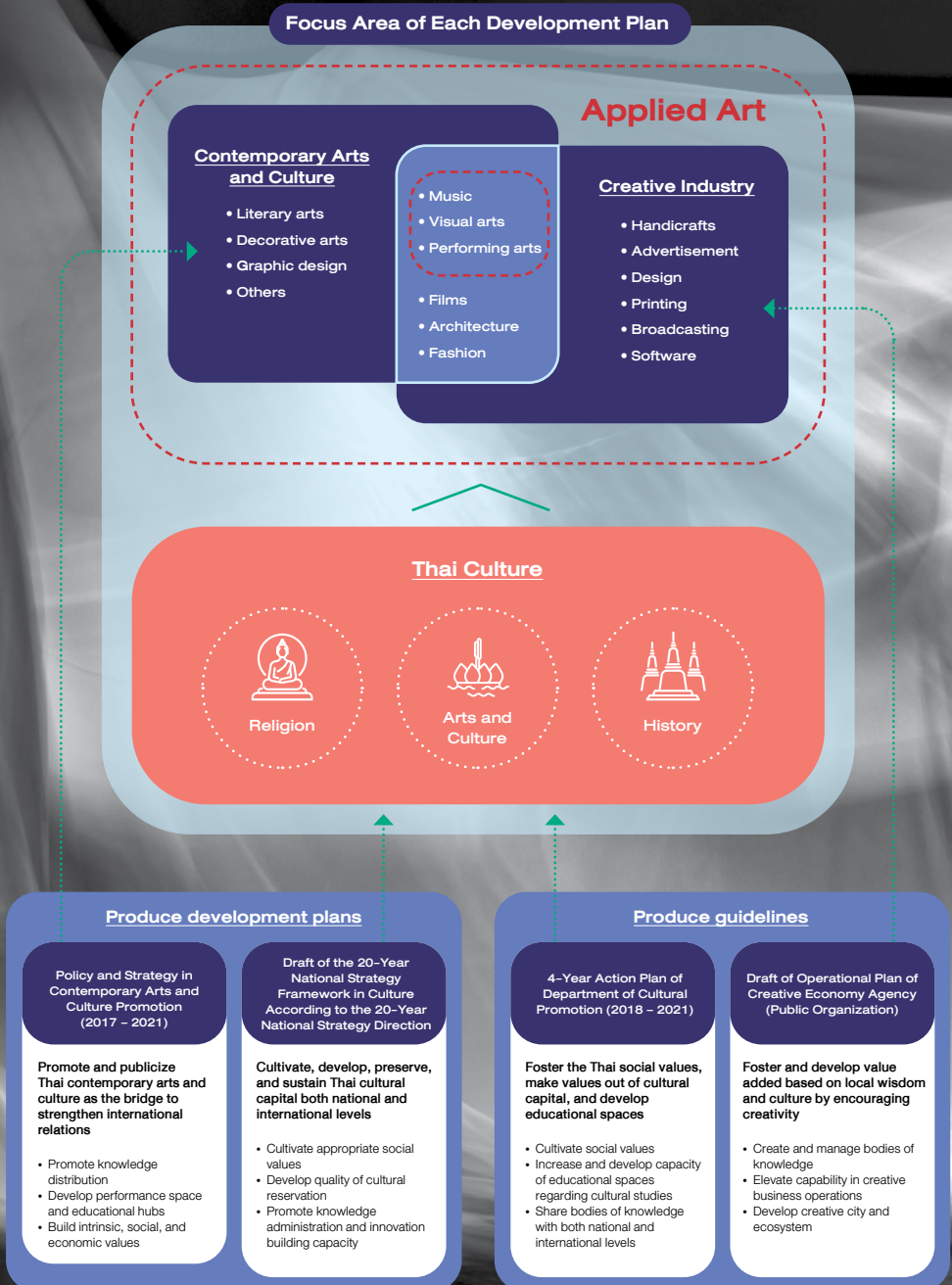
1. Draft of the 20-Year National Strategy Framework in Culture according to the 20-Year National Strategy Direction

2. 4-Year Action Plan of Department of Cultural Promotion (2018 – 2021)

3. Policy and Strategy in Contemporary Arts and Culture Promotion (2017 – 2021)

4. Draft of Operational Plan of Creative Economy Agency (Public Organization)

Overview of Related Policies and Development Plans



Roles and scopes of the aforementioned policies and development plans have been explored. It is interesting to note here that the 20-Year Strategy in Culture according to the 20-Year National Strategy Direction Framework of the Ministry of Culture is the crucial foundation for the movement to determine the direction for development and preservation of Thailand's culture. Meanwhile, the 4-Year Action Plan of The Department of Cultural Promotion (2018 – 2021) plays an important role in determine the action guideline for development and promotion of Thai cultural capital. However, the scopes of the two development plans mainly include religion, art and culture, and the original history of the nation.

The Contemporary Art and Culture Promotion Policy and Strategy (2017 – 2021) of the Office of Contemporary Art and Culture focuses on developing works in arts and culture with the content that reflects sense of recency yet reserves the root of art and culture. In 2002, the Office of Contemporary Art and Culture divided the scope of arts and culture works into 9 categories as follows: 1) visual arts; 2) performing arts; 3) music; 4) literature; 5) architecture; 6) decorative arts; 7) graphic design; 8) films; and 9) costume design. Modern techniques and technology have been applied to develop the artworks and used them as tools to communicate and to interpret ideas regarding the current situation so that the society has learned from the presentations of the works.

However, most of the policies and development guidelines had not actually been adopted for economic development. Hence, there has been establishment of organizations to drive creative industry and to implement the draft of operational plans of Creative Economy Agency (Public Organization) into the creative economic system to further enhance Thailand's economic development in the future. Thai creative industry is divided into 15 categories; six of them, however, share scopes and aspects of Thai contemporary art and culture. The six creative industries include: 1) visual arts; 2) performing arts; 3) music; 4) architecture; 5) films; and 6) costume design. From the primary study, the results show that the direction of the policies and development guidelines is in compliance with the national policies. However, each development plan focuses on different aspects.

From the study of the Draft of 20 – Year Strategy Framework in Culture according to the 20 – Year National Strategy Direction Framework, the 4 – Year Action Plan of Department of Cultural Promotion (2018 – 2021), the Contemporary Art and Culture Promotion Policy and Strategy (2017 – 2021), and the Draft of Operation Plan of Creative Economy Agency (Public Organization), the results show that the overview of development guidelines for music, performing arts, and visual arts places privilege to potentiality development, economic development, space and learning source development, and also changes of global society and technology advancement. The government then determined policies by placing emphasis on both potentiality development and

economic strengthening. The policies also emphasized on personnel development and production upgrading by creating value-added from innovation, technology, and creativity. Especially, some investment on industrial space and learning source development was cultivated since they were physical infrastructure necessary to the growth of creative businesses such as cultural centers, new theaters, and Wisithsilapin Hall. Furthermore, arts and culture preservation and inheritance, improvement of standards and laws, improvement of administration mechanism of related organizations, and construction and publication of industry database are all important factors in constructing the foundation to upgrade the overall industry to be stable and sustainable.

Conclusion of Developments related to Music, Performing Arts, and Visual Arts Industry

Development Plans Development Issues		Draft of the 20-Year Thai National Strategy Framework in Culture According to the 20-Year National Strategy Direction	4-Year Action Plan of Department of Cultural Promotion (2018 – 2021)	Policy and Strategy in Contemporary Arts and Culture Promotion (2017 – 2021)	Draft of Operational Plan of Creative Economy Agency (Public Organization)
1. Human Resource Development		✓	✓	✓	✓
2. Development for Economic Expansion		✓	✓	✓	✓
3. Preservation and Inheritance		✓	✓	✓	
4. Elevation of Infrastructure	4.1 Developing Spaces and Educational Hubs	✓	✓	✓	✓
	4.2 Constructing and Sharing Database			✓	✓
	4.3 Improving standards/ laws and administration	✓	✓	✓	

Source: Supervisor's Analysis

Regarding the development and promotion of arts and culture and creative industry, the Department of Cultural Promotion, Ministry of Culture takes vital roles in promoting, inheriting, and preserving Thailand's arts and culture to be the legacy and cultural heritage. Meanwhile, the Office of Contemporary Art and Culture and Creative Economy Agency performs some similar roles in providing supports for arts and culture, creating new artworks, and creating economic value added. The Creative Economy Agency must provide channels for cooperation and determine operational guidelines with all related organizations to sustainably move creative economy forward in long run.





SECTION

02

**Current Situations of Creative
Industry in Visual Arts**

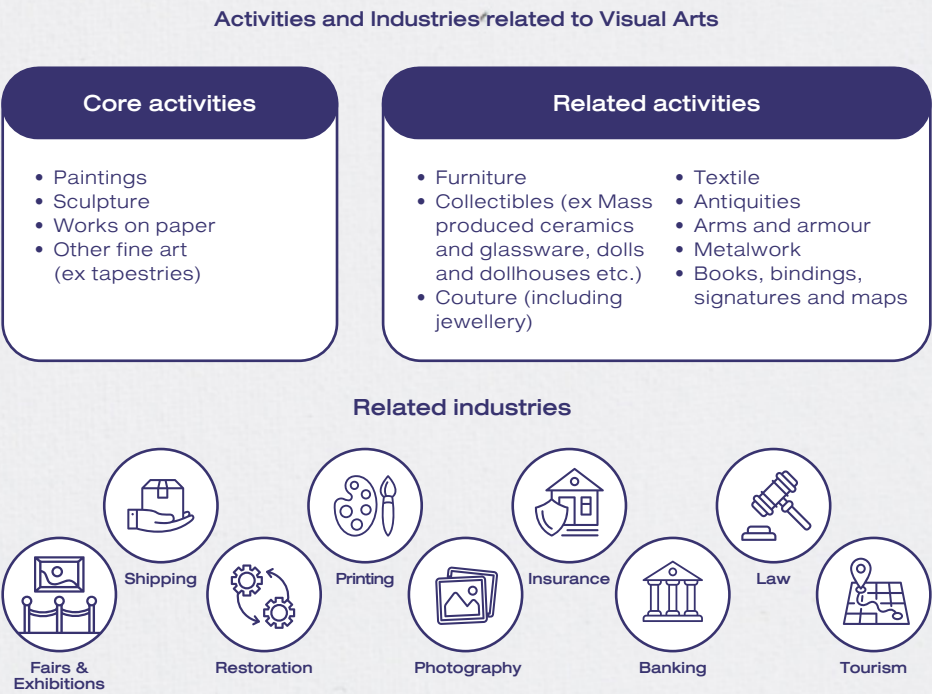
Global Situations of Visual Arts Industry

To understand the overview of international visual arts industry, it is necessary to study data of activities related to the industry, statistic data, and critics on important trends of creative industry in visual arts.



Department for Digital, Culture, Media & Sport of the United Kingdom published Creative Industries Mapping Documents 2001 which presented creative industry in each category in the UK, 13 categories in

total, including visual arts industry. This document has collected data of core activities and related activities of visual arts industry and other related industries as follows:



Source: Creative Industries Mapping Documents 2001, GOV.UK

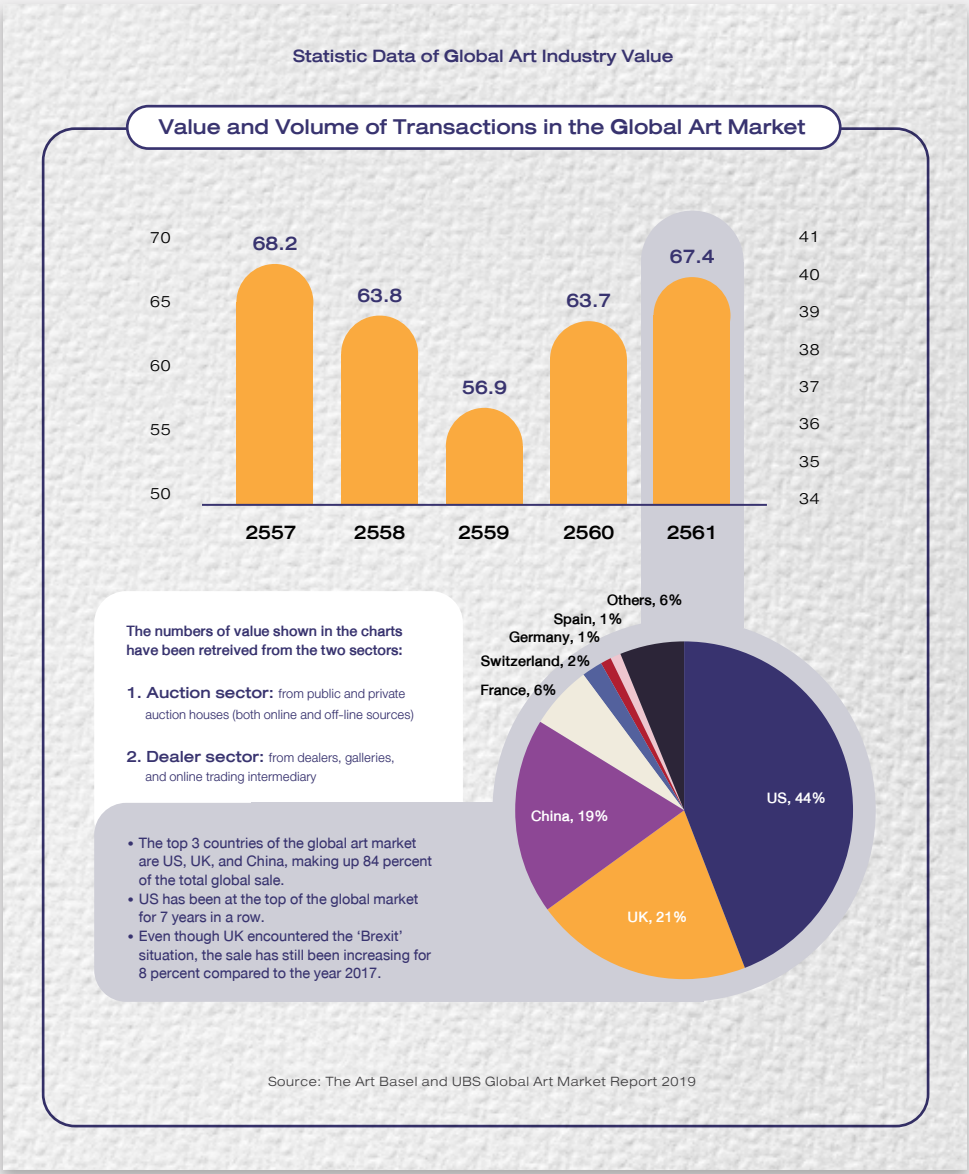
Core activities of visual arts industry in UK include drawing, sculpture, artworks on paper, and various types of fine arts (such as tapestry production). Meanwhile, related activities or supporting activities of core activities of visual arts refer to other types of art objects such as furniture and collectibles (such as ceramics and glassware), fashion design, jewelry, textile,

antiquities, arms and armor, metalwork, and even books or maps.

Apart from activities, visual arts can connect to other industries in various dimensions such as festival, exhibition, transportation, restoration, printing, photography, insurance, banking, law, and tourism.

Statistic Data regarding Current Situations of Visual Arts Industry

Statistic data related to international visual arts presented in “The Art Basel and UBS Global Art Market Report 2019”, a research conducted by Arts Economics under supports of Art Basel and UBS, consist of data regarding world art market value. The data presented are recapped as follows:



The primary data was collected from two types of trading, auction and dealer, from all over the world. The results demonstrated that since 2016 – 2018, quantity and value of artworks trading had continually increased. In 2018, there were approximately 40 million trades with overall value of 67.4 billion USD. The biggest global trading value was the United States of approximately 44%. UK was next in line by 21% and China by 19% accounting for 84% in total of the global arts trading in 2018. The US has been placed at the top rank for 7 years in a row.

Significant Trends in Visual Arts Industry

1. The United State has been the biggest art trading market. The data accumulated from 2014 – 2018 suggested that the US was placed at the top rank of arts trading activities. In the latest year, the trading value was as high as 44%.
2. New generation has played more active roles in the arts market. From the data shared by art collectors from all over the world, it shows that the number of collectors who are the new generation or the “Millennials” – born between 1981-1996 – have apparently been increasing, especially in Asia, where Millennial collectors made up 46% of the proportion.
3. Online arts market has been apparently growing. The value of online arts trading in 2018 was growing at 11% compared to the online trading value in 2017.
4. Auction has still been a crucial trading channel. From data of art trading value collected from various channels, the results indicate that arts trading through public auction in 2018 was as high as 30%, compared to those of 2016. The main reason was security; most buyers viewed that public auction was the trading channel with much lower risk compared to trading by other channels.
5. Art fairs have also played vital roles in arts market. One of the arts trading channels that has been gaining more attention is through art fairs. In 2018, the growth of fairs was 6%, compared to 2017. The sales proportion occurring in art fairs in 2018 reached 46%.

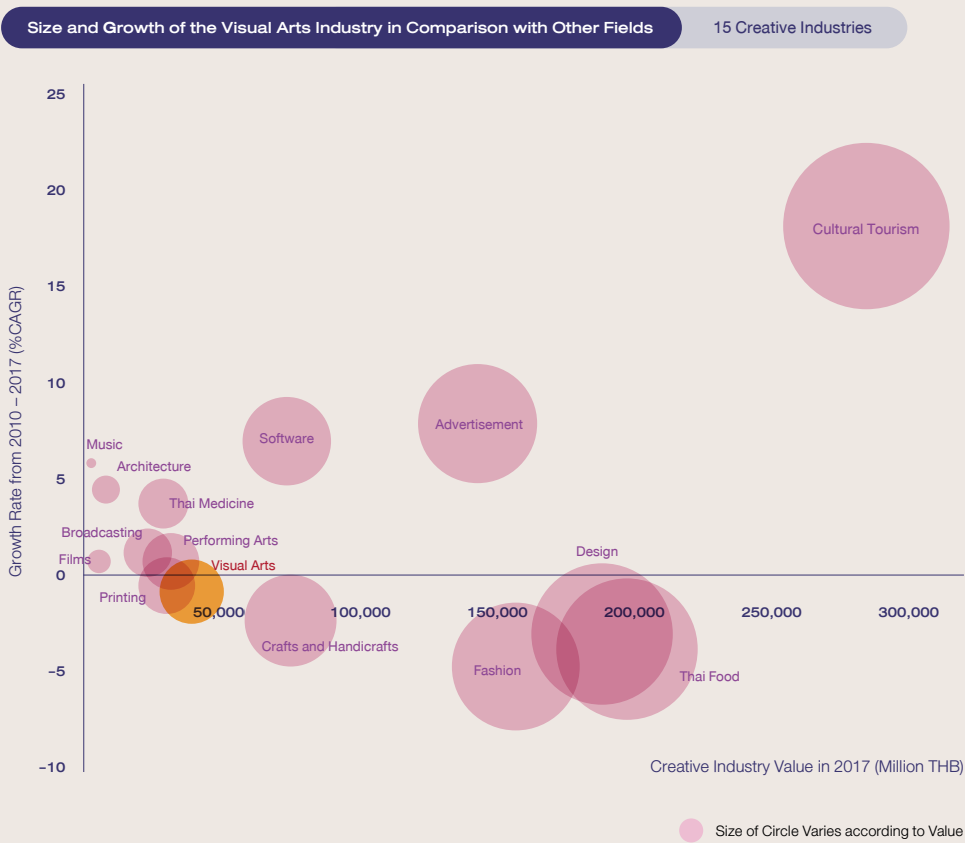
Situations of Visual Arts Industry in Thailand



Economic Value of the Visual Arts Industry in Thailand

To comprehend the situation of Thailand’s visual arts industry, it should start with understanding the situation of creative industry, particularly the field of visual arts compared with other fields. The Economic Research and Training Center, Faculty of Economics, Thammasat University, produced a report on economic values of creative industry classified by fields. In particular,

the center collected information concerning values of Thailand’s creative industry, encompassing twelve core creative industries and three relevant service industries, including cultural tourism, Thai traditional medicine, and Thai cuisine. Values and growth rates of each industry were compared, as shown in the following figure.



Note: 4-digit TSIC Industrial Value is adopted

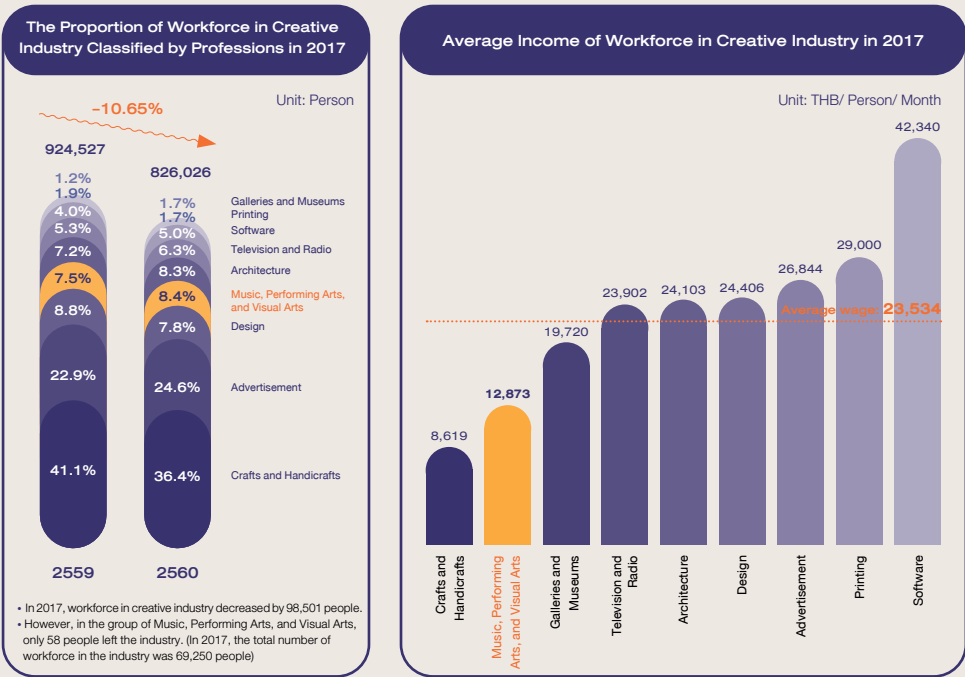
Source: Report of Economic Values of Creative Industry Classified by Production Fields and Numbers of Workforce in the Creative Industry, Economic Research and Training Center, Faculty of Economics, Thammasat University

According to the comparison of values of each category in creative industry in 2017 and growth rates of each industry (between 2010-2017) shown in the above figure, it can be noted that the visual arts industry’s value and growth were relatively low compared to other fields in creative industry.

Based on the proportion of employment and average incomes of workforce of each field, the data on employment in the field of visual arts was taken into consideration, together with numbers of workforce in the music industry and the performing arts industry, lead to the

division of workforce into nine categories. Specifically, the music industry, the performing arts industry, and the visual arts industry had employment of 69,250 workers (accounting for 8.4 percent of the entire creative industry workforce), together with an average monthly income of 12,873 THB per person; they were regarded as having low employment and income rates. Conversely, the craft industry had the highest employment but the lowest income, while the software industry had low employment rate but the highest average income in 2017 (42,340 THB per worker and per month).

The Proportion of Workforce and Average Incomes of the Creative Industry



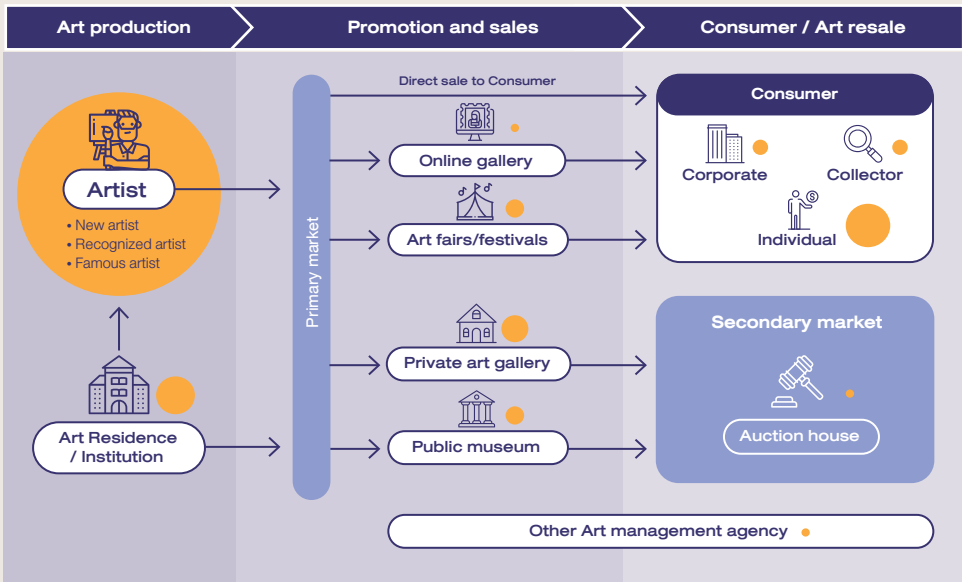
Source: Report of Economic Values of Creative Industry Classified by Production Fields and Numbers of Workforce in the Creative Industry



Value Chain of the Visual Arts Industry in Thailand

The value chain of the visual arts production process in Thailand and related institutions to be presented onwards was analyzed from interviews and a review of data from institutions in the industry to enable better understanding as to what

activities and operations are involved in the art production process. In particular, the process is divided into three main steps, namely 1) art production, 2) promotion and sales, and 3) consumers and art resale, as detailed below.



Source: Interviews and Supervisor's Analysis

1. Art production is referred to as the process of art creation. This step is primarily concerned with art creators, including aspiring (young generation) artists, rising-to-success artists, and renowned artists. They may be independent or employed by art institutions or art residences

which provide places for art production for "artists in residency" who are allowed to share resources and spaces. However, considering a scarcity of art residences in Thailand, most independent artists have to create works primarily in their own spaces.

2. Promotion and sales – after artists have created their artworks, the first sale of their works is considered the sale in the primary market. In Thailand, the primary market refers to the direct sale to buyers, whether art collectors or general buyers. In addition, the artists can sell their works through galleries; the galleries operate as an agency to provide the artists with any forms of support, regardless of locations, marketing, and provision of sales services to interested buyers. Apart from the primary market, other forms of marketing channels are also available, e.g., online sale or sale in art fairs, which now have captured some attention overseas. On the contrary, in Thailand, the art sale in online markets is not yet booming, nor are art fairs intriguing, compared to the sale in art fairs held overseas.

3. Consumers / art resale – art consumers in Thailand comprise mainly of private businesses, collectors, and general buyers. In fact, there are still a relatively small number of art buyers in Thailand's art market, compared to that of foreign countries. Apart from the primary market as the direct sale from artists, the other type is the resale of artworks to other buyers where sellers are not the original artists of the works, or simply referred to as the secondary market. This type of sale may be carried out through an auction house which holds art auctions for interested buyers. Nevertheless, art auction is not widespread in Thailand; it is commonly held overseas, such as in Singapore or Hong Kong.

The study pointed out that each type of institution in the visual arts industry had a high proportion of art creators or artists from education institutions each year, yet the market size and a number of buyers were still relatively small, thus rendering Thailand's art market rather inactive. Moreover, there were only few institutions or businesses providing supports. Hence, Thailand's art market should be further supported as presented in the analysis of problems of Thailand's visual arts industry.

Identifying Targets for the Development of the Visual Arts Industry

Considering the ecosystem of Thailand’s visual arts industry, it can be seen that in the overall picture of the industry, target groups for the development of the industry consist of two groups of personnel or institutions, namely artists/art creators and supporting businesses or art intermediaries, such as galleries, curators, and art-supporting businesses.

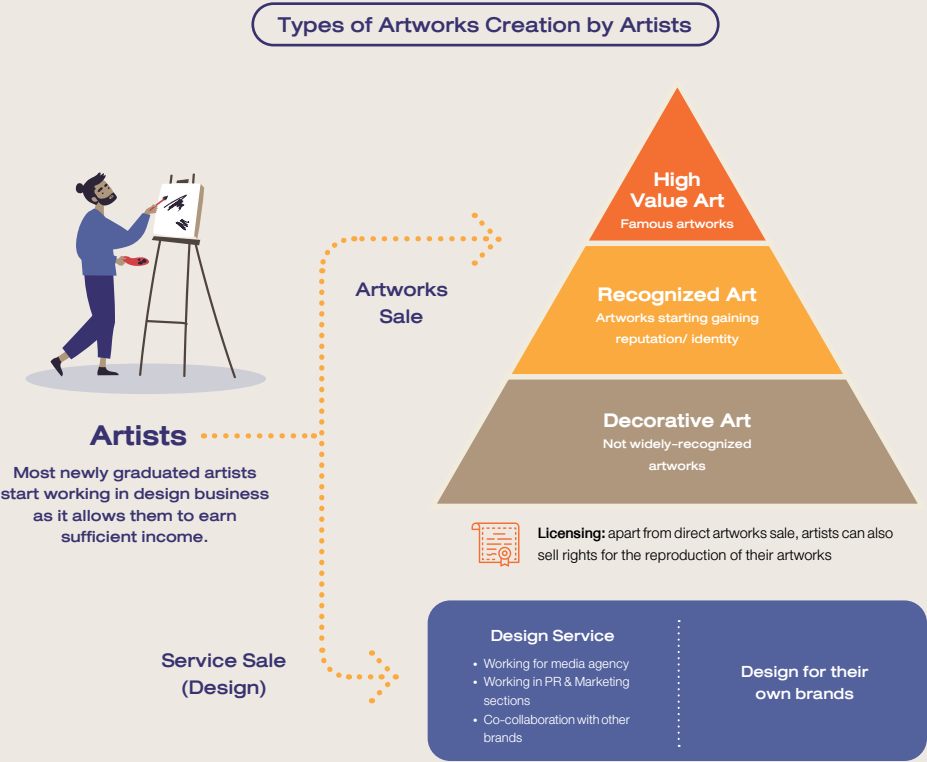


Artists

The first important target group for the development of the visual arts industry is none other than artists or art creators. As mentioned earlier, there are various forms of visual arts or mediums for expressing emotions, feelings or messages, such as fine arts as in paintings or drawings, sculptures, prints, mixed media, and new media. The artists express all of those through creation of various art forms rather than only one particular type.

In consideration of artists' methods for art creation, it can be found that besides building the career with artworks as their products, other sources of income come from artists' selling of design or selling of concept characterized as a form of services, for example, working as a hiring designer and working for media agencies or design-related departments. The study found that there were only a small number of art graduates who actually became visual artists after graduation. Conversely,

the majority of the graduates were in other lines of works, primarily in the design business. For those actually becoming artists, if they are young generation artists or aspiring artists without fame, they have to build a reputation to increase value for their works. Once they start rising to fame, the value of their arts undoubtedly increases. In addition to selling artworks, artists also sell (or license) rights of their works, i.e. selling rights for the reproduction of their artworks in other forms.



Source: Interviews and Supervisor's Analysis

Supporting Businesses

unsplash.com



In addition to art creators or artists, the other target group in the development of the visual arts industry is businesses working in alignment with arts industry; they are considered crucial for the ecosystem of Thailand's visual arts industry.

An example of art-supporting business is gallery business which acts as a marketing channel for the arts sale, together with artist incubation centers and agencies with which some artists may sign contracts. Another example is curators; they are regarded as essential personnel in the field of arts since they serve as the primary manpower in creation of design contents to present works of arts, such as art presentations in galleries or museums. To put it clearly, they help make the arts more appealing through the design of storytelling. Additionally, there are other relevant businesses, such as shipping companies with services of domestic and international art shipping; they are also considered vital in the art-supporting business.

Problems and Obstacles in the Development of Thailand's Visual Arts Industry

Problems and obstacles in the development of Thailand's visual arts industry were gathered and analyzed from interviews with stakeholders in the business, e.g., public and private institutions. The problems were classified into four main categories, including artists, spaces and supporting businesses, viewers and markets, and public

institutions. An investigation of the problems is vital for understanding the situation and operation of the visual arts industry to analyze rooms for improvement and determine appropriate strategies for the development of the industry. The results are presented as followed.

Problems and Obstacles in the Development of Thai's Visual Arts Industry

<div>Artists</div> <div>Numbers of Artists</div> <div>Attitude/Skills</div>	<div>Space/ Supporting Businesses</div> <div>Space</div> <div>Gallery</div>	<div>Audience/ Markets</div> <div>Audience</div> <div>Market</div>	<div>Government Sector</div> <div>Process/ Operation</div>
<ul style="list-style-type: none"> Numbers of artists are increasing whereas the market is not. Artists hence have to work in other related professions. The mentality of "Starving Artists" – art professions cannot earn a living. The belief that artworks should not be sold by galleries. Lack of important skills such as administration, presentation, sale, marketing channels, technology. Outdated and restricted curriculums. Expensive cost of art study. Lack of channels for knowledge sharing. 	<ul style="list-style-type: none"> Space is limited both in art-working space (especially for large-scale artworks) and displaying space. Lack of individual displaying space to support new artists' artworks. Decreasing numbers of public space which has been ignored by government sectors. Museums are not very interesting. Decreasing numbers of galleries due to the cost of management. Inaccessibility of galleries: some of them are reserved for only individual's collection. The collection is not very interesting. Lack of mutual understanding between galleries and artists, particularly on commission and service. Technology allows convenient online direct sale without the need for art dealers. 	<ul style="list-style-type: none"> Thai art market is not very active and dynamic compared to international markets due to the lack of systematic supports. The practice of direct sale, without art dealers, makes it hard to track the sale. Private customers have negative attitude toward the quality of Thai artworks and prefer international artworks. Without supports from local gallery, it is hard for artists to attend international art fairs. Lack of local quality art fairs; only some hotel art fairs offer international standard. No national art auction; the works must be brought to international art auctions. 	<ul style="list-style-type: none"> Arts in Thailand have not been very well supported. Agency staff do not have sufficient understanding and there are no effective measures to support the works. There are no committees who actually work in the industry and really understand the situation. No plans/future goal to export Thai arts. The supports always go to the same groups or artists organizations. No prior and systematic planning; some projects are launched in a haste. Lack of collaboration and integration with private sectors; some events are held exactly the same way as the private sectors' events, for example, the Biennale. Community's opinion should also be taken into account to set the direction of development. Community should also be part of the plan. The funds provided by the Office of Contemporary Art and Culture have taken too much time on document process; they do not really support the artists. Government agencies have not been adapting to keep up with the changing trends. The PR process is outdated; some trendy innovation can be adopted and replace the old PR such as Tik Tok app.
<ul style="list-style-type: none"> It is more subtle to classify artworks. That content for artworks is not universal; mostly it concerns solely religion and culture. Some contents regarding abstract "Thai-ness" can be adopted to create artworks that are distinctively different from other countries. Covid 19 situation leads to attempts to find other channels for experience-building such as touchless technologies. The old-school belief limits content-creation diversity. Artists set prices using their own standards, which affect market prices and copyright price standards. 	<ul style="list-style-type: none"> Lack of intermediary business such as art dealers and online market place, resulting in the incomplete ecosystem. Only a few businesses to produce artworks by model orders. 	<div>Data/Research</div> <ul style="list-style-type: none"> The government should make known of related data and information regarding arts so that the public has fundamental knowledge and understanding. Lack of diversity of arts research/ studies. 	<div>Regulation/ Tax</div> <ul style="list-style-type: none"> Lack of law/regulations to ensure excellent arts system, for example, regulations regarding artworks sale via arts dealers. No concrete measures to motivate private sectors to support arts. Tax is one obstacle for artworks exchange and exhibitions.

Source: Interviews and Supervisor's Analysis



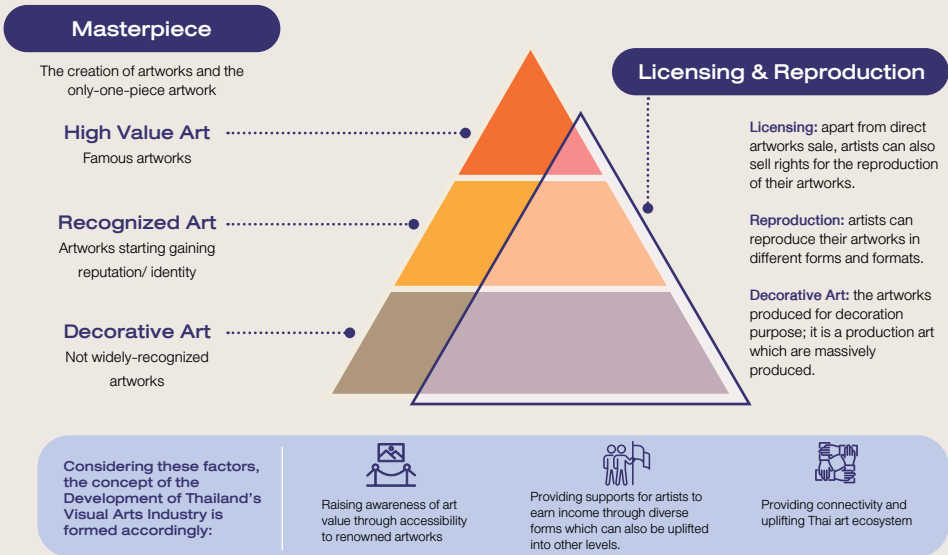
pexels.com

In reference to the problems and obstacles presented above, it indicates the operational problems in Thailand's visual arts industry. It can be noticed that each type of problem is mainly associated with factors in the overall picture of the industry (e.g. art markets). Hence, the design of guidelines for promoting the industry and addressing the problems should give precedence to developing fundamental factors of the industry for the benefit of the overall operation of the industry.

Design of Plans for the Development of Visual Arts Creative Industry

In this study, the design of plans for the development of visual arts creative industry was intended to present key issues which reflect opportunities, future trends, and guidelines for the development of the visual arts industry based on overseas case studies, as well as to analyze them and to formulate plans for the development of visual arts industry.

Concept of the Development of Thailand's Visual Arts Industry





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The main concept of the development of Thailand's visual arts industry presented above shows that overall, there is a variety of visual arts in Thailand, and it varies according to levels of the works. Visual arts or arts, when mentioned, are often referred to as creations of masterpieces of which prices vary depending on artists' fame. In the meantime, value of the works can be created through other means, such as sale of arts licensing for reproduction, development of arts into products, and works derived from reproduction as in decorative arts for greater accessibility to ordinary people.

Thus, the plans for the development of visual arts industry should cover creation of masterpieces and value creation through arts reproduction in other forms to elevate the industry, to enable people to be exposed to various forms of art, enable artists to earn incomes, expand income-generating channels, and ensure job security by promoting access to renowned artists' works. To put it in simple terms, it is necessary to focus on systematic establishment of ecosystem connection in the visual arts industry as well as promoting operation-supporting factors.





SECTION

03

Case Studies



Case Study:

The United Kingdom

The United Kingdom is one of the world-leading visual arts industries with global reputation and significantly high-valued art sale. The government sector of the UK has attached great emphasis on arts and culture as they are believed to uplift people's wellbeing. Visual arts in the UK therefore have been systematically and incessantly promoted and supported.

The Overview of Visual Arts Industry in the UK

Value Share for Global Art Market between 2014 – 2016

	2014	2015	2016
USA	39%	43%	40%
UK	22%	21%	21%
China	22%	19%	20%
Others	17%	17%	19%

The UK was the second largest market worldwide for art and antiques



The UK dominated the EU art and antiques market in 2016 and accounted for **62%** of the value of all EU sales



The UK was placed on **the top rank** of the Soft Power by Institute for Government-Monocle Soft Power Survey, 2017



Arts and Culture are vital factors contributed to UK's unique **charms** and **attraction** according to British Council Survey

Source: World Bank 2018, the British Art Market 2017, Department for Culture, Media & Sport: The Culture White Paper

The UK market is accounted as the second-largest market worldwide considering art and antiques market. Between 2014-2016, the UK generated 22 percent of the global market, while the US was placed at the top for 40 percent share and China came third holding 20 percent share. Moreover, the UK has always been at the forefront of the art and antiques market in the European Union. In 2016, for

instance, the UK generated 62 percent of the total sale in the European Union. According to a survey conducted by the British Council, it indicates that arts and culture is the first and foremost factor contributed to the country's attraction and charm making up of 42 percent; the second factor is the infrastructure for 39 percent, and the country's landscape for 36 percent.



The United Kingdom

The United Kingdom, made up of England, Wales, Scotland and Northern Ireland.



Population:
66.4 million



GDP
2.85 billion USD
GDP per capita
42,943 USD per person

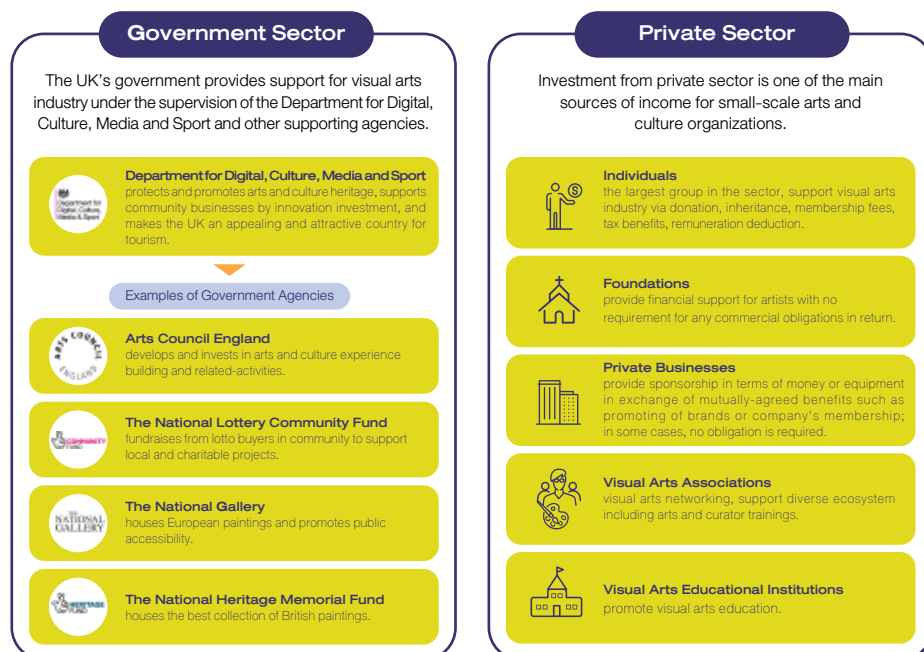


Number of internet users: 92.6% of total population

The Driving Agencies in the UK's Visual Arts Industry

The visual arts industry in the UK has been continuously developed due to the supports both from government and private sectors.

The Driving Agencies in the UK's Visual Arts Industry



Source: Department for Culture, Media & Sport: The Culture White Paper, Private Investment in Culture Survey, and Supervisor's Analysis

The UK's visual arts industry has been fully and systematically supported by the government sector under the supervision of the Department for Digital, Culture, Media and Sport which is in charge of policy and plans regarding culture, sport, digital economy and other related media. The department has been working in collaboration with other agencies in providing supports and funds to national

arts organizations which take active roles in pushing the visual arts industry to move forward. Some significant organizations include: 1) Arts Council England—a government agency dedicated to promoting the performing, visual and literary arts in England; 2) The National Gallery – a national art museum which collects a wide range of European paintings and promotes public accessibility to arts;

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the museum houses a collection of over 2,300 paintings dating from the mid-13th century to 1900; 3) The National Lottery Community Fund – a large fund raised by the National Lottery for good causes; the funds have been distributed in supporting projects which help communities and people it considers most in need.

unsplash.com



The private sector takes significant roles in supporting arts industry via investment. They are obviously significant sources of income particularly for small-scale arts and culture organizations in the UK, making up 15 percent of artists' total income, placed the third of all income sources. According to the data collected between 2017-2018, the main income sources for artists were from art creation, accounting for 52 percent, and 33 percent was from government sector's fundraising. Visual arts are the type of arts receiving the most vigorous supports from the private sector; they have been funded more than other types of arts such as music, performing arts, and literary arts. Between the year 2017-2018, the financial support from the private sector was accounted for 27 percent of the total income sources, equivalent to 545 million pounds.

Supporting Plans for the Development of Visual Arts Industry

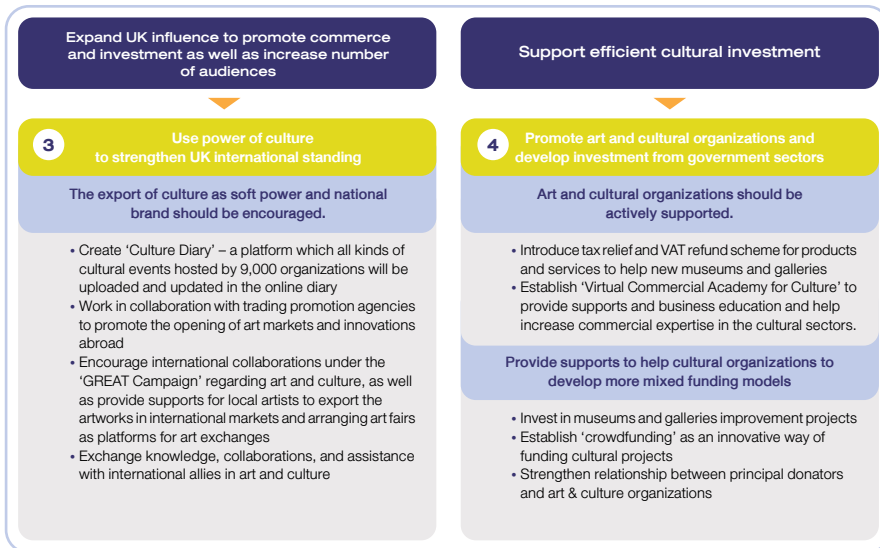
United Kingdom has determined the roles of the government sector in supporting the growth of creative industry by providing arts accessibility and promoting international art sales. The development direction has been identified by putting emphasis on preservation of local uniqueness to enhance artists’ potentiality in the global market competition. Art development plans therefore have to be collaboratively implemented by many public bodies and agencies guided by the three main cores of values of cultural goods: cultural value, social value, and economic value. Regarding the fundamental concept of value, United Kingdom hence identifies goals in promoting visual arts industry in four aspects as follows:



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Plans for the Development of Visual Arts Industry in the UK





Source: Department for Culture, Media & Sport: The Culture White Paper, and Supervisor's Analysis

UK Case Study in Conclusion

United Kingdom has placed great importance on visual arts industry based on a genuine belief that arts can bring huge economic values and are crucial tools to promote people's wellbeing and good health conditions, community solidarity, and quality education. The government thus has put attempts in laying grounds for creative industry as well as improving visual arts ecosystem,

supporting artists, providing arts accessibility for public, and developing artists' competency by adopting arts curriculums and administration. But most importantly, arts viewers and public audience must also be developed since young age so that they will be aware of the values of arts and as a local community, they will continue to eagerly support arts and culture.



Case Study:

Singapore

Singapore is so diverse in terms of ethnicity and culture. Singaporean government hence has attached great importance to arts as the tools to strengthen national identity, bring solidarity, and present national diversity. The government sector has avidly determined and set aims to develop arts industry. The following information is to give an overview of visual arts in Singapore including the industry growth, the increasing numbers of exhibitions, audience, and employment rate in the industry.



Singapore

Singapore is the smallest island-country in Southeast Asia.



Population:

5.6 million

GDP

364.16 billion USD

GDP per capita

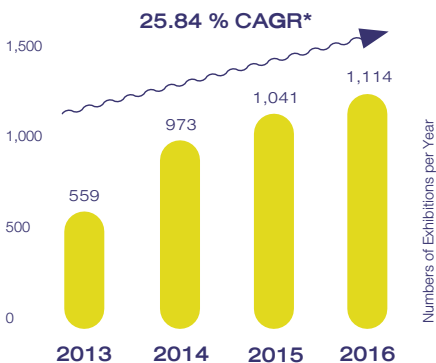
64,581.94 USD per person



Number of internet

users: 89% of total population

The Overview of Visual Arts Industry in Singapore



Singapore has the **largest visual arts institutes** in the region.



National collection of Singapore is the **largest collection in the world** for Southeast Asian artworks.



Number of exhibition visitors has been **constantly increasing** since 2011.

Source: World Bank 2018, the British Art Market 2017, Department for Culture, Media & Sport: The Culture White Paper

During the past two decades, the growth of visual arts in Singapore has been drastically expanding, confirmed by the increasing numbers of arts exhibitions from 559 exhibitions in 2013 to 973 exhibitions in 2014. The highest number was observed in 2016 for 1,114 exhibitions which made up 25.84 percent of growth. In 2016, the exhibition length of time was approximately 28,740 days with consistently growing number of audience/ exhibition visitors since 2011. The numbers have increased consistently with the employment rate of 7,500 positions, which is considered the highest employment rate compared to the employment rates for other types of arts.

Considering arts education, visual arts education is the most popular

major-option for arts students accounting for 40 percent in student proportion, whereas stage performing arts comes second for 20 percent. Regarding the fact that Singapore is very well-equipped with infrastructure and facilities, the country, without a doubt, has offered the best arts education with the largest arts institutions in the region. The Heritage Conservation Centre (HCC), for instance, is the repository and conservation facility for the management and preservation of Singapore's National Collection. The collection is conserved, maintained and stored at the Heritage Conservation Centre, the world-class facility with exemplary standards in artwork conservation and storage.



The Driving Agencies in Singapore's Visual Arts Industry

Visual arts industry in Singapore has been fully and systematically supported by the government sector supervised by the Ministry of Culture, Community and Youth with the commitment towards

developing a vibrant and sustainable arts and culture landscape in Singapore, inspiring people to take interest in arts and sports, promoting youth participation, and building community relation.

Driving Agencies in Singapore's Visual Arts Industry

Government Sector

Singapore has provided fully and systematically supports for visual arts industry supervised by the Ministry of Culture and other government agencies.



Ministry of Culture, Community and Youth
MCCY aims to inspire Singaporeans through arts and sports by promoting youth participation in community activities.



National Art Council
preserves Singaporean old culture and provides trainings for artists and companies paving their ways to success via the policy of SG Arts Plan 2018 - 2022.



Visual Arts Organizations
collect artworks under the supports of government such as Singapore Arts Museum, National Gallery Singapore

Private Sector

Investment from private sector is one of the main sources of income for small-scale arts and culture organizations



Visual Arts Organizations
hire, display, and support artists such as private galleries.



Visual Arts Educational Institutions
promote visual arts education from diploma to tertiary levels.



Visual Arts Associations
develop visual arts professional networking and promote visual arts such as People's Association.



Arts Businesses
host visual arts conferences and exhibitions to promote positive image of Singapore.

Source: SG Arts Plan 2018, and Supervisor's Analysis

The Ministry of Culture, Community and Youth has established the National Arts Council to directly supervise the arts industry emphasizing preserving Singaporean culture, training artists, and providing supports for arts organizations starting from developing artists, audience, and technologies through SG Arts Plan 2018 – 2022 policy. In addition to the National Arts Council, there are many other government agencies taking active roles to support visual arts industry, such as Singapore Art Museum – focusing

on development of international contemporary arts and National Gallery Singapore – housing the largest exhibition in Singapore and Southeast Asia. Furthermore, the government sector has been working in close collaboration with the private sector to provide essential and all-inclusive supports. The private sector, aka visual arts organizations such as non-government galleries or private galleries, take up active roles as employers, display providers, and keen supporters of visual arts artists.

Supporting Plans for the Development of Visual Arts Industry in Singapore

National Arts Council (NAC) has set vivid visions towards arts industry to promote diversity and distinctive arts to inspire people and bridge industry with community. SG Arts Plan 2018-2022 has been designed to cover three main industries namely performing arts, literary artworks, and visual arts.

Plan for the Development of Visual Arts Industry, SG Arts Plan 2018–2022

SG Arts Plan 2018 – 2020

Singapore is so diverse in terms of ethnicity and culture; Singaporean government hence has attached great importance to arts as the tools to strengthen national identity and bring solidarity.

Vision: to inspire people, connect communities with industries and position Singapore globally.

SG Arts Plan supports



Visual arts



Literary arts



Performing arts

Current Situation of Singaporean Arts and Principles to Bring Success to the Future of Arts

 <p>Pursuing arts excellency</p>	 <p>Active supports from the Government</p>	 <p>Diverse supports for arts development</p>	 <p>Promoting solidarity in diverse communities</p>	 <p>Strengthening national identity</p>
 <p>Effective use and supervision of technology</p>	 <p>Skills development</p>	 <p>Accessibility to arts and art industry</p>	 <p>Increasing numbers of audiences</p>	 <p>Increasing numbers of art spaces</p>

Source: SG Arts Plan 2018, and Supervisor’s Analysis

Singapore Case Study in Conclusion

Singaporean government sector has taken an active role as the medium to connect people with different backgrounds in terms of ethnicity and culture. Creative industry has been promoted in different dimensions starting from promoting and branding national arts, constructing ecosystem to encourage artists to produce artworks, and providing public accessibility to arts. In the meantime, the government emphasizes artists’ skills development, not only artistic skills but also administration, public relations, and arts management. In addition, audiences are also included in the development plan as one of the core factors; the development focuses on audience’s accessibility and behaviors. Organizations involving in arts exhibitions are in tandem developed to efficiently respond to the needs of both artists and audiences.





Lessons Learned and a Guideline for the Development of Thai Visual Arts Industry

According to the two case studies above, one main factor affecting the development of visual arts industry is the supports from the government sector. Five tools which can be adopted as a guideline for appropriate and effective visual arts development in Thailand are illustrated as follows.



The Government Paying Attention to the Development of Arts

- According to the two case studies, it shows that the government sector has provided arts supporting agencies, such as Arts Council, to work directly with art-related issues, set vivid goals, and develop diverse and effective arts development plans.
- Funds/ financial supports for arts development are also provided.



The Government Promoting National Image through Arts

- Each country attaches great importance on arts and culture since they are an effective channel to build national image and identity.
- Arts and culture are promoted and exported through every channel, for example, international arts fairs, special events, medias, etc.



Development of Ecosystem/ Infrastructure

- It is crucial to have efficient supporting system such as space, fund, information, PR channel.
- Supporting measures to support arts related-agencies are required.



Attaching Great Importance on Arts Education

- Arts education development is required to raise public awareness and understanding of arts.
- Supporting system to develop arts skills / public understanding is required.



Building Collaboration with Stakeholders

- The Government is not in charge of all aspects of arts development but will work in close collaboration with arts-related government and private agencies which are capable of dealing with arts-related issues and supporting arts industry.

Source: Supervisor's Analysis

From the above presentation of the industry overview along with updated information of visual arts industries both national and international levels, the differences in terms of plans and policies

for visual arts development in different countries are illustrated and compared; the information can be adopted as the ground for Thailand's visual arts development in the future.





