Research

Regional Perception Poll on the ASEAN Creative Economy

ASEAN-UK Advancing Creative Economy initiative

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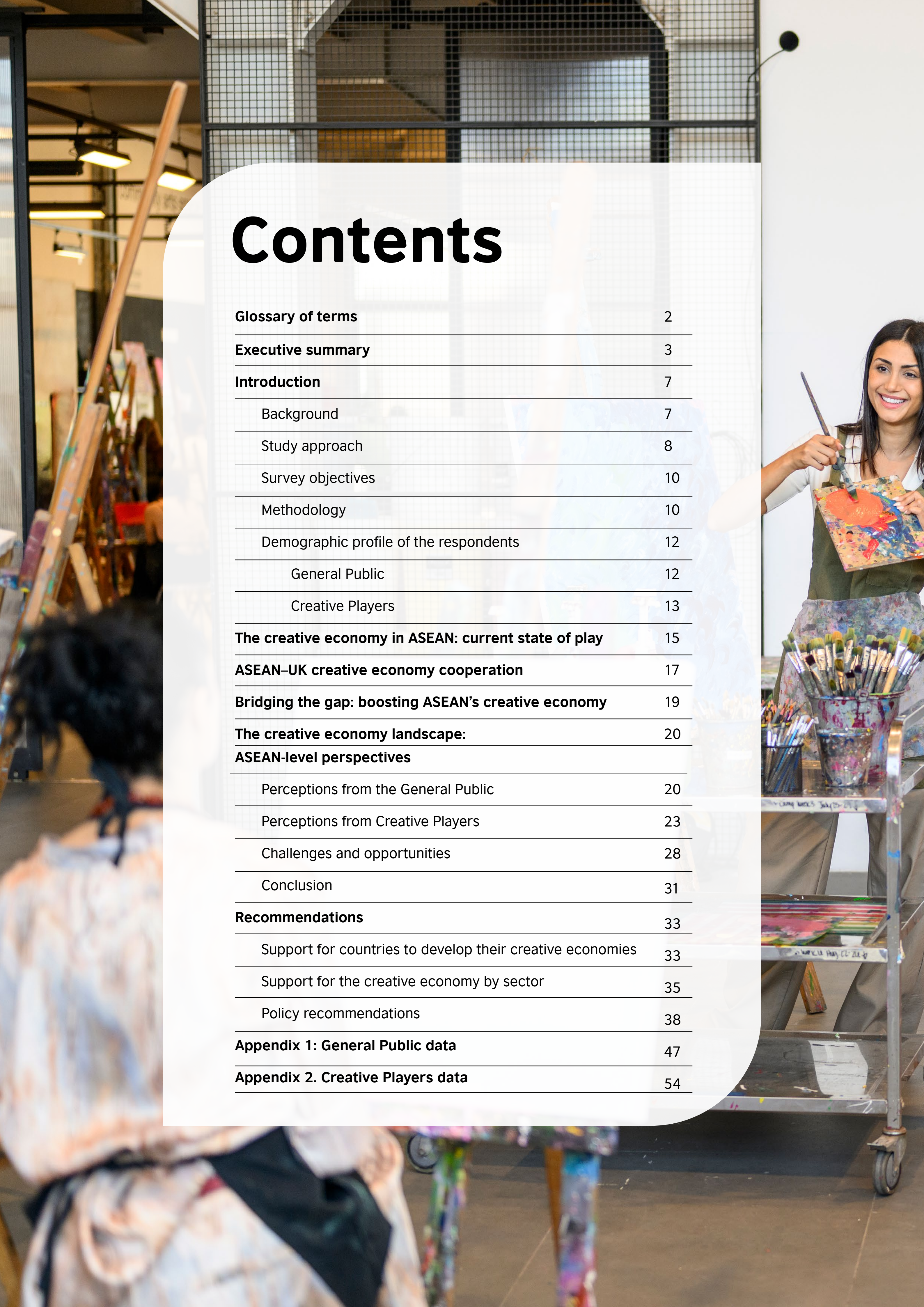


Contents

Glossary of terms

Creative hubs	A physical or virtual space that brings together creative individuals and organisations, providing support for networking, collaboration and professional development within the creative and cultural industries.
Creative placemaking	Using arts and culture to improve community spaces and boost local identity, economy and social connections.
Cross-cultural creative practices	Artistic activities that combine or involve multiple cultures to promote understanding and collaboration.
Districts	An area of a country or city, especially one regarded as a distinct unit because of a particular characteristic.
Ethnographic research methods	Studying people and cultures through observation and interviews in their natural settings.
Gastronomy	The study of the relationship between food and culture, the art of preparing and serving rich or delicate and appetising food, the cooking styles of particular regions and the science of good eating.
Graphic design	The art and practice of planning and projecting ideas and experiences with visual and textual content.
Intellectual property (IP) commercialisation	Turning IP into products or services to generate income.
IP management	Organising and protecting IP assets to maximise their value.
IP registration	Officially filing to secure legal rights for IP.
IP support services	Professional help with IP issues like protection, enforcement and licensing.
IP valuation	Assessing the monetary worth of IP.
Mode	Most frequently in a data set.
Open application programming interfaces (APIs)	Publicly available interfaces that let developers access and use a platform's features or data.
Urban design	The design of towns and cities, streets and spaces.

Executive summary

Scope and goals of the study

The Regional Perception Poll on the ASEAN Creative Economy explores the evolving landscape of the cultural and creative sectors in the Association of Southeast Asian Nations (ASEAN) and identifies the challenges and opportunities that these sectors present. It uses an ecosystem approach to understand the cultural and creative industries and to emphasise the intricate relationships among the different parties involved. Drawing from microsystems, exosystems and macrosystems, the study reveals the complex interrelations inherent in cultural and creative practices and highlights the need for creative economy strategies that are tailored and context-specific.

Methodology

The study captures perceptions from both producers and consumers, analysing two groups: the General Public and creative economy players. The assessment of the General Public category evaluates societal understanding of changes in the cultural and creative sectors in ASEAN. The analysis of the Creative Players category examines the creative economy ecosystem including enterprises, associations, government agencies and academic institutions. The study uses a survey as the major tool in gathering opinions from diverse ASEAN-wide stakeholders. Through both online and on-paper data capture techniques, surveys can effectively reach specific communities and clusters, ensuring inclusivity and representation across different demographics and sectors.

A total of 4,117 respondents, across the 10 ASEAN Member States and Timor-Leste, participated in the Regional Perception Poll on the ASEAN Creative Economy. Of the sample population, 38 per cent comprised members of the General Public and 62 per cent creative economy players. The demographic profile samples demonstrate that the Regional Perception Poll on the ASEAN Creative Economy is conducted with a commitment to treating all individuals fairly and respectfully, irrespective of gender, disability, or other personal characteristics. This ensures inclusivity and a comprehensive representation of societal views.

Major poll findings

Important results from the survey of members of the public are listed below.

Awareness

47 per cent of respondents are somewhat familiar with the term 'creative economy'. This indicates a lack of promotion regarding the creative economy, which can lead to insufficient information about the creative economy.

Perception

60 per cent affirm that the creative economy in the region is experiencing significant growth. Although the majority are not very familiar with the term 'creative economy', they are confident that the creative economy at the ASEAN regional level is undergoing substantial growth.

Perceived importance

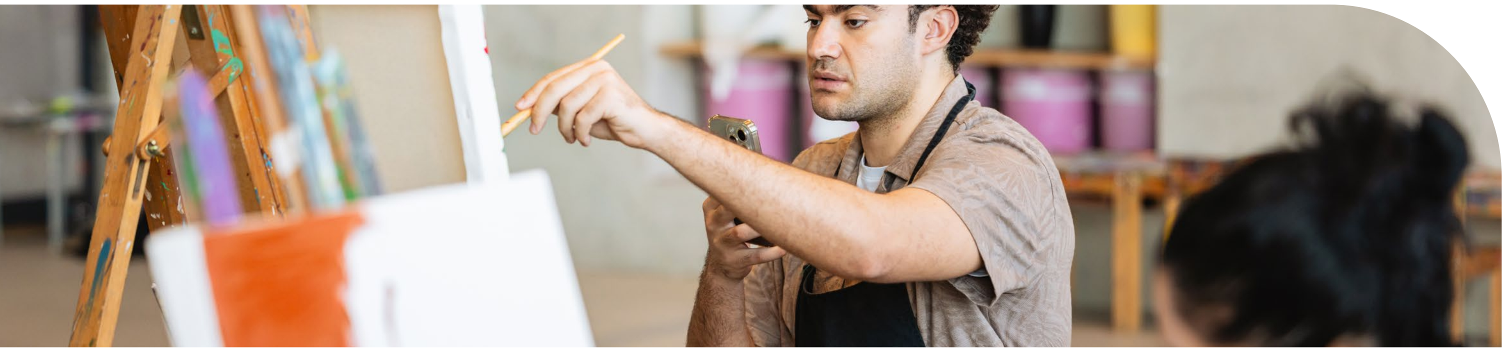
43 per cent believe that creative economy development is positively affecting economic growth in ASEAN, benefiting communities at the regional level.

Consumption

39 per cent of the ASEAN Member States (which include Indonesia, Malaysia, Myanmar, Thailand, and Viet Nam) frequently engage with creative products and services such as local films, streaming videos, music, books and local crafts. The Philippines exhibits a moderate level of consumption. In contrast, the remaining five countries – Brunei Darussalam, Cambodia, Lao People's Democratic Republic (PDR), Singapore, and Timor-Leste – tend to consume these creative offerings on an occasional basis. This variation in consumption and engagement with creative products and services indicates that there are barriers to both accessing and consuming creative products.

Barriers

53 per cent agree that the primary barrier to increased consumption of creative products and services from ASEAN is the high cost. This pricing issue arises from various factors, from both the supply and demand side, including market dynamics, production costs and the evolving nature of the creative economy. On the other hand, countries such as Indonesia, Malaysia and the Philippines overcome high costs through strong demand for culturally rich and distinctive creative products.



The major results for creative economy players are divided into three parts and listed below.

Microsystem (supports human capital)

- All countries agree that (i) creative thinking, (ii) soft skills such as communication and teamwork and (iii) marketing are the three areas rated as most important by respondents.
- 53 per cent of the respondents stated that creative and cultural programmes are still dominated by formal education (in the form of degree and non-degree programmes).
- 34 per cent believe that both governmental and non-governmental organisations give support and opportunities for training and development, to build skills and boost competitiveness.

Macrosystem (supports the environment)

- 54 per cent agree that local wisdom and culture significantly affect the development of creative and cultural products and services.
- 25 per cent recognise limited access to financing as the primary obstacle in accessing domestic and international markets for cultural and creative goods and services.
- 50 per cent identify the lack of regional coordination and cooperation as the primary challenges hindering the development of the creative economy at the regional level.

Exosystem (supports the making of work within the creative economy)

- 52 per cent state that the internet (e.g. websites of relevant organisations, blogs, podcasts) is the most frequently used medium for seeking information about the creative economy.
- Seven out of 11 countries (Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, the Philippines and Thailand) have a neutral stance regarding support for Intellectual Property (IP), including IP registration, valuation, commercialisation and associated support services such as legal advice.
- 49 per cent agree that high-speed internet access for digital creation is the most crucial infrastructure to support the growth of cultural and creative industries.
- Nine per cent (Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Viet Nam and Timor-Leste) believe that business registration, licensing and permits are the most critical aspects for supporting the development of the creative economy. The next most important business supports are aspects related to labour laws, but these are considered to be difficult to implement.
- When viewed through the lens of the value chain, design, marketing and promotion and production stage make the most use of technology to produce creative output.

Barriers, challenges and opportunities

Challenges faced by the ASEAN Member States include low public awareness, high production costs and varying consumption levels. Further obstacles include underdeveloped creative thinking and problem-solving, soft skills (e.g. communication and teamwork), marketing and branding (to promote creative work), and IP management, as well as limited access to international markets. There is also a need for stronger regional coordination among ASEAN Member States to foster a more unified and supportive creative ecosystem.

Opportunities that could be tapped include formal education, which is quite well established and benefits the creative industries; the internet and social media, which serve as important channels for information and promotion; and local wisdom, which shapes a country's creative economy significantly.

Recommendations

Several recommendations emerge from the perception poll results, such as greater use of technologies for design, marketing and promotion and production purposes and more frequent use of internet-based media such as websites, blogs and podcasts (52 per cent) to convey information about the creative economy. In addition, skills and expertise in creative thinking and problem-solving techniques, soft skills, and marketing and branding are considered most important for Creative Players. It is therefore crucial that schools, universities and other formal educational institutions offering creative and cultural programmes consider what skills and expertise need to be taught for the industry to flourish.

Introduction

Background

The creative economy has emerged as a significant driver of economic growth and resilience, social inclusion and equity, international influence and intercultural dialogue and sustainable development. However, the supporting ecosystem for the creative economy is not yet fully developed and needs improvement.

The creative economy, which relies on the contributions of micro- and small enterprises, is an economy driven by ideas and a significant catalyst for economic growth.[1] According to the United Nations, the creative economy 'encompasses a range of localised, knowledge-based economic activities that integrate development aspects and linkages at both macro and micro levels within the broader economy'.[2] John Howkins has noted that the creative economy is emerging as the predominant economic model of the 21st century.[3] The World Intellectual Property Organization describes this sector as all industries directly or indirectly involved in the creation, production, broadcasting and distribution of copyright-protected goods and services, with IP at its core.[4] This is often referred to as the copyright model.

Collaboration is central to professional development, knowledge exchange and networking between policymakers and creative practitioners. In 2018, the World Conference on the Creative Economy was created to foster international collaboration; highlight the role of creativity in driving inclusive and sustainable economies; and shift the focus from dependence on natural resources to knowledge-based economies.[5]
The ASEAN-UK Advancing Creative Economy programme is delivered/launched by the British Council,[6] with co-funding from the UK's Foreign, Commonwealth, & Development Office and in partnership with the ASEAN Secretariat, which focuses on boosting professional development, cultural exchange and research in the arts and creative sectors.

By empowering policymakers and practitioners, the programme aims to foster innovation and creativity across the region.[7] ASEAN and the UK are committed to advancing cooperation in specified priority areas through designated activities.

The ecosystem approach is better capturing and bridging knowledge gaps by providing a mechanism through which information can be collated and fed into the policy process,[8] especially based on the reasons below:

1. Neither policy frameworks nor institutions are developing at the same pace as innovation and growth are occurring within sectors of the economy. This results in a situation where innovation and creativity hotspots can be mismanaged by policymakers who are unable to react to the rapidly changing landscape they are dealing with.
2. The complex interrelations 'always-already exist'[9] in processes of cultural and creative practice and cultural and creative product delivery.[10]
3. This approach to analysing and understanding the cultural and creative sectors stresses the importance of relations among actors.[11]

Further theories of creative economies need to be developed ad hoc for specific contexts, as they cannot be a direct translation of Western concepts into the Asian context.[12]

1. British Council. (2024, October 12). About Creative Economy. British Council. Retrieved February 28, 2025, from https://creativeeconomy.britishcouncil.org/about/
2. United Nations Economist Network. (2021). Creative economy. United Nations. Retrieved February 28, 2025, from https://www.un.org/sites/un2.un.org/files/orange_economy_14_march.pdf
3. United Nations Industrial Development Organization. (2022). The creative ecosystem: Facilitating the development of creative industries. Retrieved February 28, 2025, from https://www.unido.org/publications/ot/9653523
4. World Intellectual Property Organization. (2017). The economic contribution of copyright-based industries in the global economy. WIPO. Retrieved February 28, 2025, from https://www.wipo.int/edocs/pubdocs/en/copyright/893/wipo_pub_893.pdf
5. World Conference on Creative Economy. (n.d.). About. Retrieved February 28, 2025, from https://www.wcce.uz/en/pages/about
6. Programme that aims to strengthen the creative economy of ASEAN Member States through collaboration with the UK, focusing on professional development, knowledge exchange, and building networks of policymakers and creative practitioners in both regions.
7. British Council Indonesia. (n.d.). ASEAN Creative Economy Initiative. Retrieved February 28, 2025, from https://www.britishcouncil.id/en/programmes/arts/asean-creative-economy-initiative-0
8. Gasparin, M., & Quinn, M. (2021). Designing regional innovation systems in transitional economies: A creative ecosystem approach. Growth and Change, Vol. 52 No. 2, pp. 621-640. https://doi.org/10.1111/grow.12441
9. Gross, J. D., & Wilson, N. C. (2019). Creating the environment: The cultural eco-systems of creative people and places. King's College London.
10. Markusen, A., et al. (2011). Creative cities: A 10-year research agenda. Retrieved February 28, 2025, from ResearchGate database.
11. De Bernard, M., Comunian, R., Gross, J. (2022). Understanding the role of higher education as part of a wider creative and cultural ecosystem. Cultural Trends, 31(4), 332–353. https://doi.org/10.1080/09548963.2022.2110322
12. Fahmi, M., et al. (2017). Creative economy policy in developing countries: The case of Indonesia. Urban Studies, Vol. 54, No. 6, pp. 1367-1384. Retrieved February 28, 2025, https://www.jstor.org/stable/26151420

Study approach

The ecosystem approach is essential for bridging knowledge gaps and strengthening the policymaking process by creating a framework for collating and integrating information.[8] This is particularly crucial as policy frameworks and institutions often lag behind the rapid innovation and growth occurring in various economic sectors. Consequently, policymakers may struggle to manage innovation hotspots effectively in a constantly evolving landscape.

Moreover, understanding the cultural and creative sectors requires a nuanced approach which emphasises the intricate relationships among the actors involved.[11] The complex interrelations inherent in cultural and creative practices call for tailored theories of creative economies, which are context-specific rather than adaptations of Western concepts for Asian contexts.[12] This underscores the importance of developing frameworks that are responsive to local dynamics and can effectively inform policy decisions.

8. Gasparin, M., & Quinn, M. (2021). Designing regional innovation systems in transitional economies: A creative ecosystem approach. *Growth and Change*, Vol. 52 No. 2, pp. 621-640. https://doi.org/10.1111/grow.12441
11. De Bernard, M., Comunian, R., Gross, J. (2022). Understanding the role of higher education as part of a wider creative and cultural ecosystem. *Cultural Trends*, 31(4), 332–353. https://doi.org/10.1080/09548963.2022.2110322
12. Fahmi, M., et al. (2017). *Creative economy policy in developing countries: The case of Indonesia.* Urban Studies, Vol. 54, No. 6, pp. 1367-1384. Retrieved February 28, 2025, https://www.jstor.org/stable/26151420

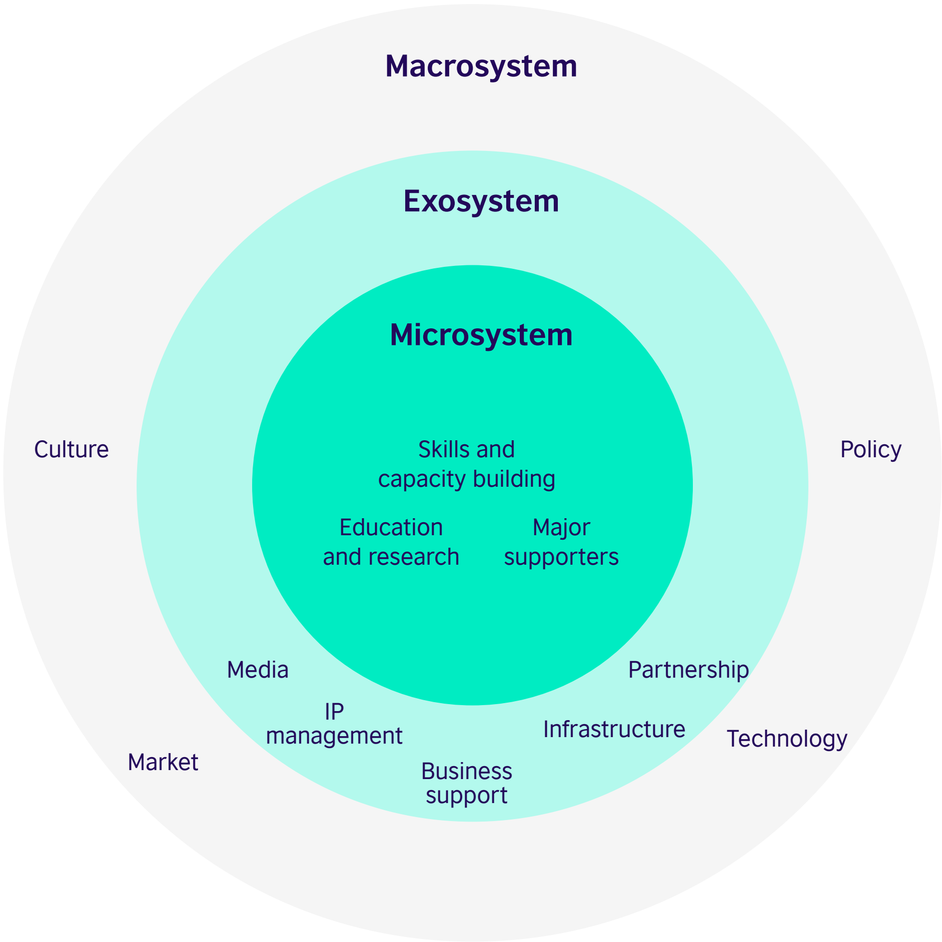


Figure 1. The ecosystem approach

The microsystem refers to the immediate environment and core components directly involving Creative Players. The exosystem encompasses settings in which the Creative Players are not an active participant but where events occur that influence or are influenced by their environment. The macrosystem represents the broader context in which the ecosystem operates, including external factors, trends and forces that shape its overall dynamics and functioning.

The study aims to capture perceptions from both producers and consumers, divided into two groups: the General Public and creative economy players, or Creative Players. The analysis of the General Public category aims to assess society's understanding of the changes in the landscape of ASEAN's cultural and creative sector. In contrast, the Creative Players category focuses on the creative economy ecosystem in ASEAN and comprises creative enterprises and businesses, associations, government agencies, creative makers and academic institutions. This approach seeks to identify the challenges and opportunities within the cultural and creative sectors in the region.

Survey objectives

Specifically, the objectives of the study are:

- to understand the **changing landscape** of the cultural and creative sectors in ASEAN
- to understand the **challenges and opportunities** of the cultural and creative sectors in ASEAN
- using the results, to form the baseline reporting to assess the state of play in the creative economy in ASEAN and inform efforts to improve **regional cooperation** in promoting the development of the ASEAN creative economy.

Ultimately, this survey provides recommendations for framing future collaborations between the UK and ASEAN in promoting creative economic development.

Methodology

Surveys are a vital tool for gathering opinions from diverse ASEAN-wide stakeholders and gaining insights into the regional issues, aspirations and challenges faced by various communities.[13] Through both online and on-paper data capture techniques, surveys can effectively reach specific communities and clusters, ensuring inclusivity and representation across different demographics and sectors. This dual approach allows for broader participation, catering for those with limited internet access while also making use of digital platforms for quicker and more efficient data collection. Such comprehensive engagement is crucial for understanding stakeholders' multifaceted perspectives, which can inform regional policy dialogues as well as interventions to improve cooperation and deal with pressing concerns within the ASEAN framework.

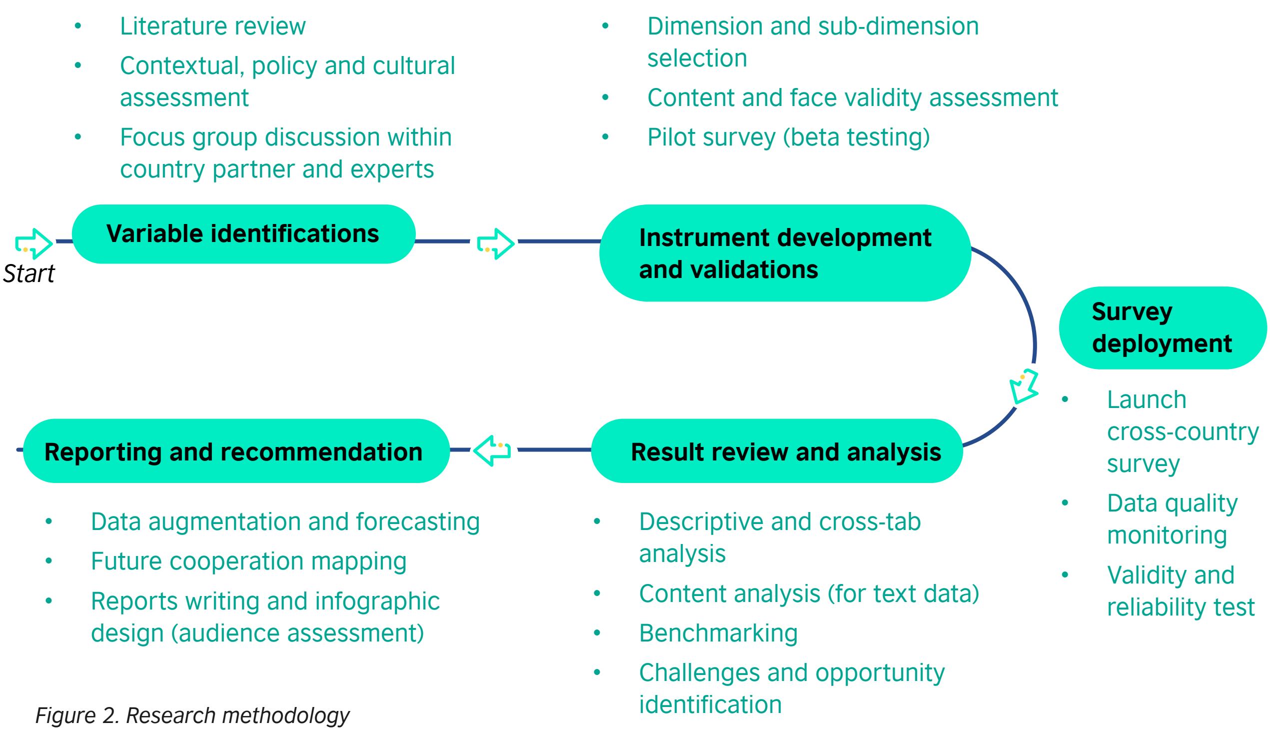


Figure 2. Research methodology

13. Scribbr. (n.d.). *Survey research*. Retrieved February 28, 2025, from https://www.scribbr.com/methodology/survey-research/

Of the sample population, 38 per cent are members of the General Public and 62 per cent are creative economy players. These distributions are proportionate to demographic factors, total population sizes and the creative economy's contribution to economic growth. Notably, the sample representation is slightly higher for Singapore, Malaysia, Indonesia, the Philippines, Viet Nam and Thailand, reflecting ASEAN's trend in exporting creative goods.[14] Table 1 provides a detailed overview of the survey methodology based on these demographic categories. Our objective is to gather a total of 4,117 data points, distributed as follows:

Table 1. Distribution of samples

Countries	General Public	Creative Players	TOTAL
Brunei Darussalam	103	125	228
Cambodia	100	100	200
Indonesia	200	400	600
Lao PDR	112	87	199
Malaysia	244	519	763
Myanmar	149	158	307
The Philippines	113	306	419
Singapore	250	201	451
Thailand	150	300	450
Viet Nam	100	300	400
Timor-Leste	50	50	100

14.ASEAN Secretariat. (2021). Mapping the readiness of ASEAN's creative ecosystem. *The ASEAN Magazine*. Retrieved February 28, 2025, from https://theaseanmagazine.asean.org/article/mapping-the-readiness-of-aseans-creative-ecosystem/

Demographic profile of the respondents

General Public

The analysis of the General Public category aims to evaluate society's overall understanding of the evolving landscape of the cultural and creative sectors within ASEAN. The objective is to gather insights into public awareness and perceptions of the creative economy, as well as how individuals support it, particularly through consumption. The demographic profile of the General Public samples does not discriminate against respondents based on specific criteria such as gender, disability or location. This ensures inclusivity and a comprehensive representation of societal views.

Gender distribution among the sampled society at the ASEAN level is slightly weighted towards those who identify as female (51 per cent). However, the survey also represents male respondents (47 per cent), individuals who chose not to disclose their gender (one per cent) and other genders (one per cent).

Approximately six per cent of participants identified as individuals with disabilities (including D/deaf, disabled or neurodivergent people). A very small percentage of those surveyed (one per cent) chose not to answer. The majority of participants (93 per cent) did not identify as having any disability.

Determining respondents' country of origin and country of residence is vital when carrying out regional surveys as these factors shape consumer perceptions and migration patterns. Country of origin influences how consumers view product quality and brand reputation, often leading to preferences for goods from specific countries, such as Indonesian batik or Thai tea. Meanwhile, country of residence affects migration decisions, as individuals consider economic opportunities and living conditions. Understanding these factors will help ensure migrants' needs are met, thereby fostering economic growth and cultural integration within regions.

Of the 11 countries surveyed, four (Cambodia, Lao PDR, the Philippines, and Singapore) have residents who are living outside of their country of origin. Among these, Lao PDR has the highest percentage of its citizens now residing in other countries, accounting for seven per cent. For Cambodia, the Philippines, and Singapore, the figures are four per cent, one per cent and one per cent respectively.

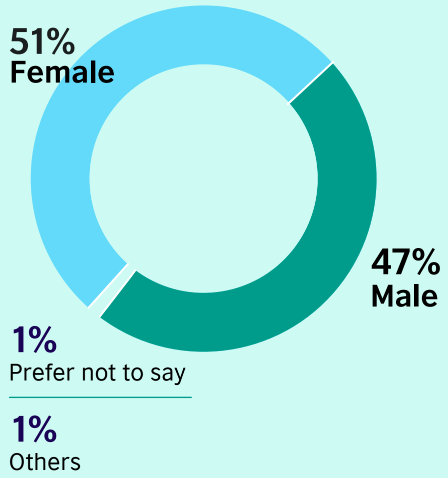


Figure 3. Gender proportions (%)

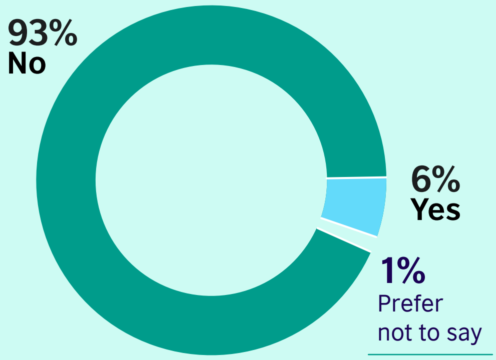


Figure 4. Disability proportion (%)

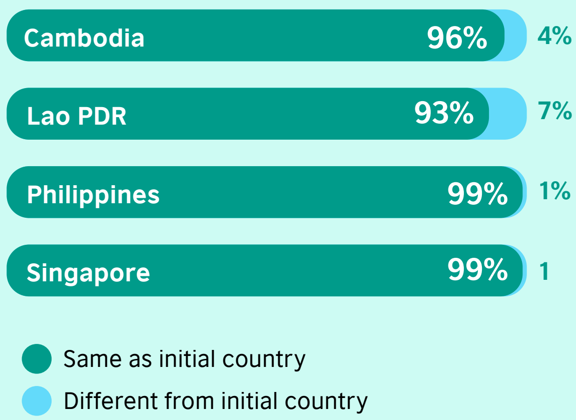


Figure 5. Country of residence: General Public category (%)

Creative Players

This study subdivides the Creative Players category according to two basic factors: organisational type and type of creative outputs. This is in recognition of the fact that the creative economy of a region thrives when various stakeholders support one another within their ecosystem.

We classify stakeholders into six organisational types:

1. freelance/gig workers
2. government
3. employees in micro-, small or medium-sized enterprises
4. employees in large businesses
5. academic institutions
6. trade/business organisations/associations.

Furthermore, we acknowledge that the creative economy produces a diverse range of output that can vary significantly between countries. We therefore include 13 specific outputs for creative economic sub-sectors,[15] along with an open-ended option to ensure comprehensive coverage of the entire creative economy.

According to the Regional Perception Poll on the ASEAN Creative Economy, Creative Players in the ASEAN region are predominantly freelance/gig workers (42 per cent) and employees in micro-, small or medium-sized enterprises, i.e. those with fewer than 100 employees (25 per cent). In contrast, government roles and other affiliations represent a relatively small proportion. This finding aligns with the understanding that the creative economy relies significantly on the contributions of micro- and small enterprises, is driven by innovative ideas, and serves as a crucial catalyst for economic growth.

Figure 6. Creative Players category composition (%)

15. Fashion design and clothing technology; built environment (architecture, building design, landscape design, urban design and planning, interior design); film, video and photography; television and radio (broadcast and podcast); performing arts (music, dance, theatre); literature and publishing; advertising and marketing; visual arts and crafts; animation and video games; design (product, furniture, graphic, etc.); IT, software and computer services; and gastronomy/culinary.

According to the perception poll, the majority of creative output in the region is represented by visual arts and crafts, while the lowest percentage is attributed to animation and video games. The data indicates that fashion design and clothing technology, film, video and photography, and performing arts (including music, dance, and theatre) account for a relatively small proportion of the creative output in terms of the overall percentage across countries.

Examining the data on a country-by-country basis indicates that certain nations exhibit similar patterns in terms of the dominance of particular creative outputs. For instance, Thailand, the Philippines, Myanmar, and Brunei Darussalam typically generate more output in visual arts and crafts than in other creative sectors.

Conversely, Indonesia and Malaysia focus primarily on design outputs, such as product design, furniture design and graphic design. Additionally, Viet Nam and Timor-Leste have a higher concentration of gastronomic/culinary creative output.

There are also countries whose dominant creative outputs are unique. For example, distinct from other nations, Singapore primarily produces creative outputs in IT, software and computer services. Lao PDR tends to focus on advertising and marketing, while Cambodia shows a preference for outputs related to the built environment, such as architecture, building design, landscape design, urban design and planning, and interior design.

Table 2. Creative output by country (%)

	Brunei Darussalam	Cambodia	Indonesia	Lao PDR	Malaysia	Myanmar	The Philippines	Singapore	Thailand	Viet Nam	Timor Leste
Fashion design and clothing technology	3%	8%	9%	7%	11%	16%	4%	8%	1%	17%	10%
Built environment (architecture, building design, landscape design, urban design and planning, interior design)	3%	26%	7%	4%	5%	5%	7%	15%	2%	14%	6%
Film, video and photography	15%	12%	12%	11%	9%	7%	10%	6%	8%	7%	16%
Television and radio (broadcast and podcast)	4%	6%	2%	2%	2%	2%	3%	3%	2%	1%	6%
Performing arts (music, dance, theatre)	8%	8%	10%	1%	6%	9%	11%	4%	7%	3%	4%
Literature and publishing	4%	5%	6%	0%	7%	7%	6%	7%	5%	2%	10%
Advertising and marketing	20%	8%	10%	42%	11%	4%	11%	6%	2%	16%	2%
Visual arts and crafts	16%	10%	9%	10%	15%	37%	22%	5%	57%	4%	14%
Animation and video games	5%	2%	7%	5%	4%	2%	4%	2%	3%	1%	0%
Design (product, furniture, graphic, etc.)	13%	9%	13%	4%	23%	6%	14%	7%	9%	4%	2%
IT, software and computer services	3%	3%	4%	1%	5%	2%	3%	19%	1%	5%	6%
Gastronomy/ culinary	3%	4%	12%	10%	0%	3%	2%	3%	2%	20%	24%
Others (please specify)	3%	0%	0%	0%	0%	1%	3%	15%	1%	4%	0%

Highest percentage of each country

Lowest percentage of each country (excluding those who chose the 'Others' option)

The creative economy in ASEAN: current state of play

The growth of creative sectors varies across the ASEAN region. Following the Boston Consulting Group's framework for government interventions throughout the creative economy value chain (see Figure 7),[16] ASEAN has identified four essential factors that must be considered to boost the creative economy in the region.[17] This framework explains how governments can create interventions from the supply side, from the demand side and through market efficiency mechanisms.

First, most ASEAN Member States have included the creative economy in their national development strategies. However, the creative industries in Lao PDR and Myanmar are still in the early stages and **policy building** is essential to development.

Second, micro-, small and medium-sized enterprises (MSMEs) have been instrumental in catalysing economic growth, particularly in the creative economy sector. Yet in terms of **sustainable financing**, MSMEs in ASEAN continue to rely on a blend of private and public funding sources.

This reliance stems from two main factors:

1. The widespread perception that MSMEs are high-risk ventures for many private financing institutions.
2. The dependence of many MSMEs operating in the cultural and artistic sectors on personal financing and donations.

Third, **digital readiness** remains uneven across the area, even though the region hosts some of the fastest-growing digital start-ups (including e-commerce platforms such as Lazada, Shopee, Grab, and Gojek) and has seen a continuous increase in the use of digital financial services. Digital readiness encompasses not only infrastructure but also skills and adoption. Last, the clustering of creative industry networks to foster innovation and growth also appears to be uneven

Countries with consolidated national strategies support the development of creative centres. However, the data remains uncoordinated.

16.Rosenzweig, J., Roche, P., Chishty, F., Thompson, A., & Ahmad, F. (2018). *How governments are sparking growth in creative industries* (Report). Boston Consulting Group. Retrieved February 28, 2025, from https://web-assets.bcg.com/img-src/BCG-How-Governments-are-Sparking-Growth-in-Creative-Industries-Mar-2018_tcm9-187340.pdf

17.ASEAN Secretariat. (2021). *The ASEAN Creative Economy* (Oct.-Nov. 2021 issue). Retrieved February 28, 2025, from https://asean.org/wp-content/uploads/2021/11/The-ASEAN-Oct-Nov-2021-Digital-v1.pdf

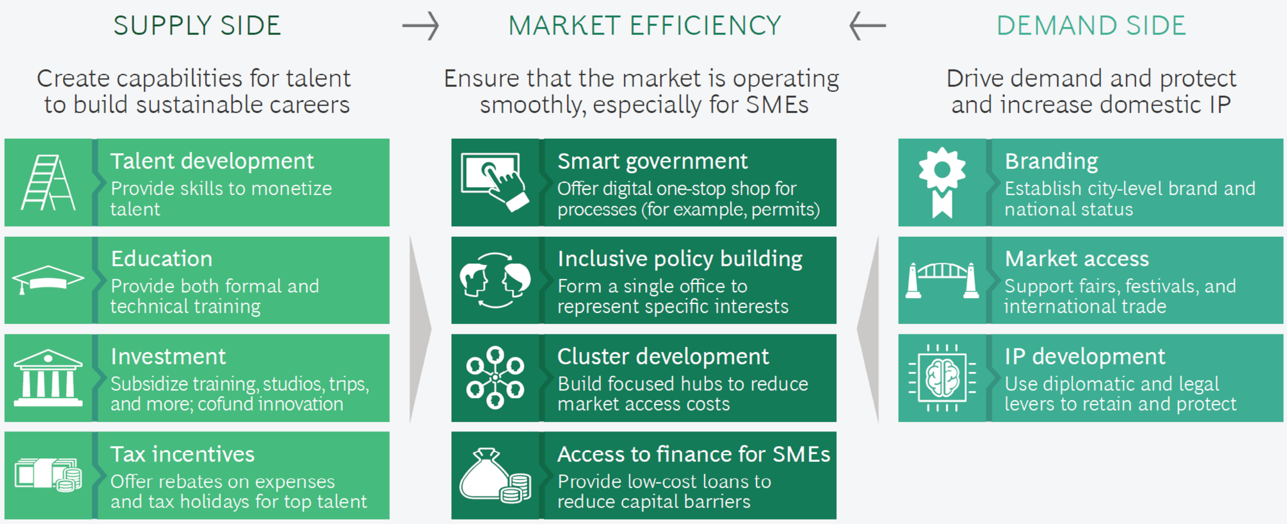


Figure 7. The BCG framework for government interventions throughout the creative economy value chain
Source: (Rosenzweig et al., 2018)

The *ASEAN Strategic Plan for Culture and Arts 2016–2025* has been established to tackle the aforementioned issues and incorporates the following strategies:[18]

- Harness the contribution of the creative industries towards innovations, generating livelihoods and supporting economic development in ASEAN Member States.
- Coordinate an ASEAN-wide funding support mechanism (e.g. financing facilities, venture funds, regional competitive fund), in partnership with the private sector, for the creative industries in the ASEAN region.
- Facilitate creative industry cooperation in ASEAN in areas such as film, music, and animation, etc.
- Promote ASEAN as a centre for human resource development and training for cultural and creative sectors by facilitating the linkage of educational institutions and the creative industries for collaboration on technology transfer, capacity building, product and design development, and arts curriculum development.
- Encourage visits and exchanges between AMS and ASEAN Dialogue Partners (DPs) of persons and professionals engaged in the arts, culture, literature, archival materials, cultural and art education, cultural institutes and creative industries.
- Partner with cultural institutions (e.g. inter-government institutions, foundations, academies, cultural centres, etc.) in AMS and DPs on programmes and projects related to cultural conservation, cultural and arts education, cultural events and festivals, and creative industries.

18. ASEAN Secretariat. (2016). *ASEAN strategic plan for culture and arts 2016–2025*. Retrieved February 28, 2025, from https://asean.org/wp-content/uploads/2021/01/ASEAN-Strategic-Plan-for-Culture-and-Arts-2016-2025.pdf

ASEAN–UK creative economy cooperation

The cooperation between ASEAN and the UK has strengthened significantly since the UK became a Dialogue Partner in 2021.[19] In the Plan of Action to Implement the ASEAN-United Kingdom Dialogue Partnership (2022–2026), ASEAN and the UK have committed to advancing cooperation in specified priority areas through designated activities. This collaboration will be conducted following their obligations under international law and aligned with their respective domestic laws, regulations and policies.[20] One of the specified priority areas – 'economic cooperation'[21] – relates closely to the development of the creative economy in this region. Its plan includes:

1. Trade and investment

- To promote continued growth in trade, ASEAN and the UK have mutually agreed to collaborate on opening markets and fostering an open, free, and transparent trading environment that supports the rules-based international system. The UK is contributing expertise from both its government and leading private sector to assist ASEAN's needs, enhance cooperation in key economic policy areas, and deepen trade relations.
- The UK's Intellectual Property Office attachés in South-East Asia are actively supporting ASEAN governments, the ASEAN Secretariat, international development partners, and industries in building a rules-based intellectual property system. Meanwhile, the British Standards Institution is advising ASEAN on adopting and implementing international standards to facilitate a common language for trading partners and improve access to global markets.
- Regular policy exchanges occur between the UK Competition and Markets Authority and the ASEAN Experts Group on Competition, focusing on strengthening ASEAN's competition regulations in emerging sectors such as digital markets and sustainability.
- ASEAN–UK cooperation on supply chain centres on deepening trade links to enhance economic resilience and foster ASEAN's economic growth. The UK has shared expertise with the ASEAN Secretariat through the Boston Consulting Group on opportunities for future sector leadership, including developing frameworks for industrial projects and strengthening the ASEAN medtech sector.
- In July 2023, the UK announced a £25 million ASEAN-UK Economic Integration Programme designed to support ASEAN economic integration and promote stronger, more equitable growth through improved regulations, better trade systems and expanded access to financial services.

19. Partner nations that have played an important role in the development of ASEAN over the past half-century.
20. ASEAN Secretariat. (2022). *Final plan of action to implement the ASEAN-United Kingdom dialogue partnership (2022–2026).* Retrieved February 28, 2025, from https://asean.org/wp-content/uploads/2022/08/FINAL-ASEAN-UK-POA-2022-2026.pdf
21. UK Government. (n.d.). *UK-ASEAN factsheet*. Retrieved February 28, 2025, from https://www.gov.uk/government/publications/uk-asean-factsheet/uk-asean-factsheet--2

2. Financial services

- The UK is ASEAN's third-largest trading partner in financial services. Financial services represent nearly 16 per cent of the UK's services exports to ASEAN, amounting to approximately £1 billion. The UK is recognised as a leader in financial services innovation, regulation, and talent. Notably, it hosts a thriving fintech ecosystem with over 10,000 fintech firms supported by a favourable regulatory environment.

3. Infrastructure

- The UK possesses expertise across the entire lifecycle of infrastructure development and aims to share this knowledge while facilitating the involvement of UK businesses in supporting ASEAN projects.
- The UK's ASEAN Sustainable Leadership in Infrastructure Programme unites voices from academia, multilateral organisations, and the private sector to equip ASEAN policymakers with the tools, models, and experience required to plan, procure, and deliver sustainable, resilient infrastructure for all.

4. Digital

- The ASEAN-UK Digital Innovation Partnership serves as the UK's platform for digital cooperation with ASEAN, focusing on three core pillars: digital economy business partnerships, digital trade policy, and digital government.
- The partnership seeks to identify where digital solutions can best deliver mutual benefits for UK and Southeast Asian businesses, encompassing areas such as e-payments, regulatory reform, and trade facilitation. In February, the British Standards Institution shared best policy practices on the implementation of recognised standards in digital trade.
- From 13 to 14 March 2023, UK-Southeast Asia Tech Week was held in Jakarta, Indonesia, the location of the ASEAN Secretariat and the capital of the 2023 Chair. The UK sent a delegation of companies to ASEAN to exchange ideas and explore business opportunities with some of the brightest technology minds in the region.

5. Science and innovation

- The UK is renowned for its world-class science and technology. It is capable of undertaking joint research with partner countries, supporting technology transfer, and bringing together experts from across the globe to share ideas and expertise.
- The UK's Newton Fund invested over £114 million in research and innovation activities in Indonesia, Malaysia, the Philippines, Thailand, and Viet Nam between 2014 and 2022.
- The UK Space Agency supported projects in Indonesia, Malaysia, the Philippines, and Viet Nam under the five-year £152 million (approximately $190 million) International Partnership Programme, which leverages the UK space sector's research and innovation strengths to deliver sustainable economic or societal benefits to emerging and developing economies.
- Throughout Southeast Asia, the UK has increased its resources dedicated to science and technology, including the appointment of new specialised staff covering the entire ASEAN region in Indonesia and the Philippines, as well as doubling its teams in Singapore and Malaysia.
- In 2022–23, the UK provided over £1 million in programme funding for collaborative projects in Thailand, Singapore, and Viet Nam focusing on digital standards, genomics, marine autonomy, climate science, and electro-mobility.
- Following the launch of the UK's International Technology Strategy in March 2023, more than £400,000 will be invested in the financial year 2023–24 in projects with ASEAN Member States concerning artificial intelligence (AI) and engineering biology.

Bridging the gap: boosting ASEAN's creative economy

Table 3 is based on the four essential factors that must be considered to boost the creative economy in the region and increase cooperation between ASEAN and the UK. It outlines areas where initiatives are already abundant and where significant improvements are still needed.

Table 3. Factors to enhance creative economy and ASEAN–UK cooperation

	ASEAN–UK cooperation
Factor: **Policy building**	The ASEAN Creative Economy Sustainability Framework is designed to provide a platform and act as a roadmap for ASEAN policymakers and relevant stakeholders to co-create a way forward in developing the cultural and creative industries (CCIs). It facilitates the exchange of ideas and views concerning the Creative Economy and appraises pertinent research and evidence with the aim of developing a whole-of-ASEAN approach to drive regional cooperation.
Factor: **Sustainable financing**	The UK partnered with the Asia-Pacific Financial Forum and ASEAN Business Advisory Council to deliver a forum for regional discussions on digital trade, supply chain finance, financial infrastructure and sustainable growth for micro-, small and medium-sized enterprises.
	The UK launched the report Green Finance: Opportunities for Deeper ASEAN-UK Cooperation.
	The Bank of England is running several virtual workshops on payment systems for ASEAN central banks, hosted by Bank Indonesia.
Factor: **Digital readiness**	UK-Southeast Asia Tech Week was delivered in Bangkok, Ho Chi Minh, and Singapore, with delegates joining from Malaysia and the Philippines. This brought together British and Southeast Asian tech companies, researchers and officials to build new commercial partnerships, exchange ideas and agree on new areas of collaboration.
	In support of the Sustainable Development Goals (SDGs), the UK supports the regional Research and Innovation for Development in ASEAN (RIDA) programme and a separate regional training programme on technology commercialisation (ASEAN i-Teams, focused on Indonesia and Viet Nam). In June 2024, the UK launched a new initiative on AI for Sustainable Development in ASEAN (AISDA) at the ASEAN Ministerial Meeting on Science, Technology and Innovation.
	The inaugural ASEAN-UK Dialogue on Science, Technology and Innovation was held in the Philippines.
	The UK supported more than 100 businesses, researchers and government officials from Southeast Asia to visit the UK for London Tech Week. The programme included site visits to research and development centres, meetings with UK tech companies and investor and policy roundtables.
Factor: **Clustering**	No initiatives were planned or executed.

Source: *https://www.gov.uk/government/publications/uk-asean-association-of-southeast-asian-nations-factsheet*

The creative economy landscape: ASEAN–level perspectives

Perceptions from the General Public

The survey of the General Public aims to uncover general perceptions about the creative economy in each ASEAN Member State and across the region. It covers public awareness, perceptions, perceived importance, consumption patterns and perceived barriers. These dimensions are important in shaping creative economy demands and public support towards creative economy developments in the region. See appendix 1 for more detailed visual illustrations of the data.

47%

somewhat familiar with the term **'creative economy.'**

Awareness

A total of 47 per cent of respondents are somewhat familiar with the term 'creative economy'. This represents the highest proportion of respondents in ten of the 11 participating countries (all except Cambodia). This moderate level of familiarity suggests that while awareness of the term is not universal, it is to some degree acknowledged, recognised or understood based on prior experience or knowledge. In the majority of countries that are somewhat familiar with the creative economy, this is attributed to numerous initiatives undertaken at the ASEAN level by relevant stakeholders, including national policies and frameworks, as well as the direction of creative economy development in each country. In Cambodia, however, survey results indicate that the majority of its society is not familiar with the term.

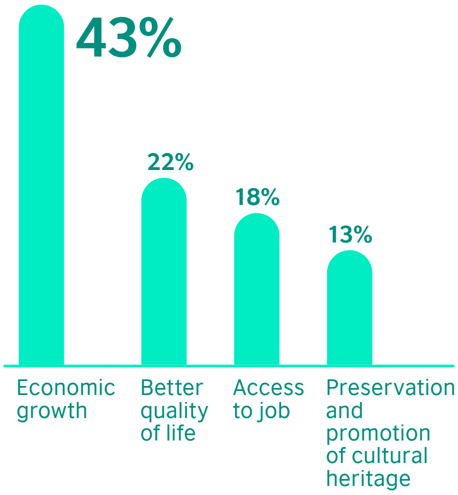
60%

describe the current state of the creative economy in the ASEAN region as 'growing.'

Perception

In all the ASEAN Member States, members of the public perceive the creative economy in the region as experiencing significant growth, with 60 per cent of total respondents affirming this trend. One major driver of this expansion is increased consumer investment in creative outputs, which stimulates job creation and economic development.[22] Other drivers are technological innovations such as digital distribution and AI, which transform the production and consumption of creative products by lowering costs and enabling new business models for global reach.[23] Moreover, the creative economy contributes not only to economic growth but also to cultural diversity and social inclusion, playing a crucial role in shaping societal values and ideologies across ASEAN.[24]

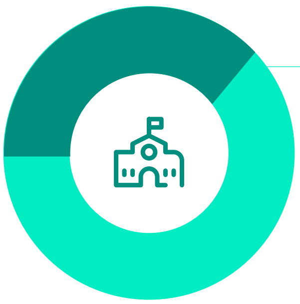
22. Deloitte. (n.d.). *The future of the creative economy*. Retrieved February 28, 2025, from https://www.deloitte.com/uk/en/Industries/tmt/perspectives/the-future-of-the-creative-economy.html
23. United Nations Conference on Trade and Development. (n.d.). *Creative economy programme.* Retrieved February 28, 2025, from https://unctad.org/topic/trade-analysis/creative-economy-programm
24. United Nations. (2021). *Creative economy*. Retrieved February 28, 2025, from https://www.un.org/sites/un2.un.org/files/orange_economy_14_march.pdf



Perceived importance

A total of 43 per cent of respondents indicate that the development of the ASEAN creative economy has a positive impact on economic growth, benefiting communities at the regional level. This view is held by the highest proportion of respondents in ten of the 11 countries (all except Myanmar). The creative economy in the ASEAN region has emerged as a crucial catalyst for economic growth. The region's exports of creative products are predominantly driven by the design sector, with notable contributions from Indonesia and Thailand.[25]

For Myanmar, the creative economy is perceived as having the biggest effect on improving quality of life, followed by improving access to employment opportunities, with its social benefits considered to be greater than its economic impact.



39%

indicate that they frequently consume creative goods and services, such as local films, streaming videos, music, books and local crafts.

Consumption

This view is held by the highest proportion of respondents in five of the 11 countries (Indonesia, Malaysia, Myanmar, Thailand and Viet Nam) In contrast, the remaining five countries (Brunei Darussalam, Cambodia, Lao PDR, Singapore and Timor-Leste) tend to consume these creative offerings occasionally, while the Philippines demonstrates a moderate level of consumption.

The ASEAN Member States' varying levels of engagement with creative products and services can be attributed to a combination of economic, cultural, technological and policy-related factors. Notably, Indonesia's government has made significant strides in promoting its creative economy as a national priority, positively affecting consumption levels in this country.[26]

53%

agree that the primary barrier to increased consumption of creative products and services from ASEAN is the high cost.

Barriers

This view is held by the majority of respondents in seven of the 11 countries (Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Singapore and Thailand). This pricing issue arises from various factors, including market dynamics, production costs and the evolving nature of the creative economy. There is a growing consumer preference for unique, culturally rich and high-quality offerings, particularly as countries such as Indonesia, Malaysia and the Philippines promote their creative industries, leading to heightened demand for distinctive local goods and subsequently higher prices.[27]

Additionally, many ASEAN Member States still lack robust policies to support their creative sectors effectively. The absence of financial sustainability frameworks and standard valuation practices can hinder growth and perpetuate elevated prices due to inefficiencies in production and distribution.[21]

25. ASEAN Secretariat. (2021). Supporting the creative economy for sustainable development in Southeast Asia. The ASEAN Magazine. Retrieved February 28, 2025, from https://theaseanmagazine.asean.org/article/supporting-the-creative-economy-for-sustainable-development-in-southeast-asia/
26. Economic Research Institute for ASEAN and East Asia. (n.d.). Indonesia's report on creative services (Chapter 5). Retrieved February 28, 2025, from https://www.eria.org/Chapter%205-Indonesia's%20%20Report%20on%20Creative%20Services.pdf
27. ASEAN Secretariat. (2021). Supporting the creative economy for sustainable development in Southeast Asia (Part 2). The ASEAN Magazine. Retrieved February 28, 2025, from https://theaseanmagazine.asean.org/article/supporting-the-creative-economy-for-sustainable-development-in-southeast-asia-2/

To sum up,
the General Public in the ASEAN region shows only moderate awareness of what a creative economy is and limited understanding of how the public can contribute to it. This is reflected in ASEAN Member States' varying consumption of and engagement with creative products and services. Creative products are still perceived as high-cost and out of reach for most members of the public. On the positive side, the public believes that the creative economy is a catalyst for economic growth and could contribute to a larger national economy.

Perceptions from Creative Players

The creative economy is inseparable from the interactions and co-creation that occur between its players. Our survey uncovered opinions from Creative Players, academic institutions, associations and government agencies to provide insights into the current landscape of the creative economy, from the micro level to exo- and macro-level perspectives. This sheds important light on the level at which interventions are needed to support creative economy growth.

Microsystem (supports human capital)

All countries agree that **creative thinking and problem-solving** are highly important, followed by soft skills (e.g. communication and teamwork) and marketing and branding (to promote creative work).

Creative thinking and problem-solving are crucial for generating innovative solutions and adapting to complex challenges in today's world. Soft skills like communication and teamwork, along with marketing and branding abilities, are also essential for effectively collaborating and promoting creative work.[28]

A total of

53%

of respondents acknowledge the existence of schools or campuses offering creative and cultural programmes, primarily within formal education.

This view is held by the majority of respondents in 10 of the 11 countries (all except Indonesia). The growing demand for the creative economy has driven curriculum innovation focusing on creativity and practical knowledge application. Institutions now incorporate project-based learning and real-world problem-solving into their programmes.[29] Many educational institutions partner with creative industries to keep curricula relevant and aligned with market needs, boosting student employability through experiential learning and networking opportunities.[30] In contrast, Indonesian Creative Players believe there is a larger role for creative and cultural programmes via communities, social media or forums, along with non-formal education such as courses and certifications.

A total of

34%

of respondents concur that **support and opportunities for training and development** to build skill sets and boost competitiveness stem primarily from both governmental and non-governmental organisations.

This view is held by the majority of respondents in six of the 11 countries (Indonesia, Malaysia, the Philippines, Singapore, Thailand and Viet Nam). Collaboration between government and non-governmental support is crucial for the growth of the creative economy, as both sectors fulfil complementary roles. This synergistic partnership fosters innovation, drives economic growth and cultivates a supportive environment for entrepreneurs, ultimately maximising the potential of the creative economy. However, in five other countries (Brunei Darussalam, Cambodia, Lao PDR, Myanmar, and Timor-Leste), opportunities are viewed as being predominantly derived from non-governmental organisations, with limited options available.

28. Harvard Business School Online. (n.d.). What is creative problem solving? Retrieved February 28, 2025, from https://online.hbs.edu/blog/post/what-is-creative-problem-solving
29. Peters, T. (2007). Creative problem solving [Paper]. Pacific Education Studies Association. Retrieved February 28, 2025, from https://pesa.org.au/images/papers/2007-papers/peters2007.pdf
30. Comunian, R., Faggian, A., & Li, Q. C. (2015). Higher education and the creative economy: Creative graduates, knowledge transfer and regional impact debates. European Planning Studies, 23(10), 2017–2034. https://doi.org/10.1111/gec3.12220

Exosystem (supports for the making of work within the creative economy)

A total of
52%
of respondents agree that the internet is the most frequently used medium for seeking information about the creative economy.

This view is held by all countries. The internet makes creative products more visible, allowing creators to present their work without significant financial investment. Additionally, it fosters community engagement and builds relationships between consumers and producers.[31]

In 7 of 11 countries
(Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, the Philippines and Thailand), Creative Players adopt a neutral stance towards **IP (IP) support**, including IP registration, valuation, commercialisation and associated support services such as legal advice.

IP rights are crucial for safeguarding the creativity and innovations that drive the creative economy. They empower creators such as artists, musicians and designers to monetise their work and gain recognition, fostering an environment conducive to further creativity and innovation. The World Intellectual Property Organization (WIPO) underscores that IP not only protects individual creations but also promotes cultural and social advancement by encouraging the emergence of new products and services.[32] In Singapore, accessing IP support appears to be relatively straightforward, whereas in Brunei Darussalam, it is perceived as either difficult (specifically concerning IP registration and legal advice) or uncertain (regarding IP valuation and commercialisation).

A total of
49%
of respondents agree that **high-speed internet access** for digital creation is the most crucial infrastructure for stimulating the growth of cultural and creative industries.

This view is held by the majority of respondents in ten of the 11 countries (all except Cambodia). Research indicates a positive correlation between improved digital infrastructure and the expansion of creative industries, as it enables faster information exchange and fosters innovative business practices.[33] Furthermore, targeted policies are essential for nurturing talent and enhancing digital creative industries, especially in developing regions where there is significant demand for local content but a shortage of skilled professionals.[34]

31. Deloitte LLP. (2021). *The future of the creative economy* (Report prepared for Netflix International B.V.). Retrieved February 28, 2025, from https://www.deloitte.com/content/dam/assets-zone2/uk/en/docs/industries/technology-media-telecommunications/2023/deloitte-uk-future-creative-economy-report-final.pdf
32. The Reputeo. (n.d.). Intellectual property: Creative economy driver. Retrieved February 28, 2025, from https://www.thereputeo.com/blog/intellectual-property-creative-economy-driver
33. Kosasih, A. (2022). The impact of digital infrastructure on creative economy growth in Indonesia. *International Journal of Artificial Intelligence Research,* ISSN: 2579-7298 Vol. 6, No. 1, June 2022.
34. Asian Development Bank. (2021). Targeted policies: Digital creative industries can drive economic growth in Asia and Pacific. Retrieved February 28, 2025, from https://www.adb.org/news/targeted-policies-digital-creative-industries-can-drive-economic-growth-asia-and-pacific

A total of
9%
of respondents believe that **business registration, licensing and permits** are the most critical aspects for supporting the development of the creative economy.

This view is held by the majority of respondents in seven of the 11 countries (Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Viet Nam and Timor-Leste). Business registration is essential for safeguarding IP rights for creative entrepreneurs. The connection between business registration and the creative economy is complex, encompassing legal protection, economic contributions, streamlined processes, collaborative support systems and enhanced competitiveness.[35] This legal protection encourages creativity by creating a secure environment where creators can invest time and resources without the fear of losing their work to unfair competition. The next most important business supports, according to respondents, are aspects related to labour laws, digital rights management, and consumer protections. These are all considered to be difficult to implement but crucial, considering the nature of the creative economy, which is dominated by informal workers and artists.

When viewed through the lens of the value chain, design, marketing and promotion, and production stage make the most use of technology to produce creative output. This view is held by the majority of respondents in ten of the 11 countries (all except Lao PDR). Digital technologies make innovation significantly more efficient, catalysing the creative industries to develop new products and services.[36] However, in Lao PDR, the greatest use of technology is observed in marketing and promotion processes.

35. World Intellectual Property Organization. (n.d.). Leveraging Indonesia's creative economy. *WIPO Magazine*. Retrieved February 28, 2025, from https://www.wipo.int/en/web/wipo-magazine/articles/leveraging-indonesias-creative-economy-40992
36. Zhao, X., Shen, L., Jiang, Z. (2024). The impact of the digital economy on creative industries development: Empirical evidence based on the China. *PMC*. Retrieved February 28, 2025, from https://pmc.ncbi.nlm.nih.gov/articles/PMC10917265/

Macrosystem (supports the environment)

A total of
54%
of respondents agree that local wisdom and culture significantly affect the development of creative and cultural products and services.

This view is held by the majority of respondents in seven of the 11 countries (Cambodia, Indonesia, Malaysia, Myanmar, Singapore, Thailand and Viet Nam). Local wisdom not only boosts local economic competitiveness but also stimulates the creative economy. Indeed, research indicates that local economic competitiveness positively influences the creative economy, both directly and indirectly, through local wisdom.[37] However, in Brunei Darussalam, the majority of Creative Players view local wisdom and culture as having a neutral influence on the development of creative and cultural products and services.

A total of
25%
of respondents recognise limited access to financing as the primary obstacle in accessing domestic and international markets for cultural and creative goods and services.

This view is held by the majority of respondents in six of the 11 countries (Indonesia, Lao PDR, Myanmar, the Philippines, Thailand and Viet Nam). This constraint severely impairs the growth and sustainability of the creative economy, as many entrepreneurial ventures rely on personal funds instead of external capital, due to the intangible nature of their assets. Hesitation on the part of traditional financial institutions to lend without tangible collateral compounds the issue and is exacerbated by insufficient understanding and support from financial entities.[38] For Creative Players in countries such as Brunei Darussalam, Cambodia, Malaysia, Singapore and Thailand, additional hurdles include lack of digital capabilities, insufficient market information and an inability to scale business models effectively for international expansion. These combined challenges significantly hamper the development of vibrant creative economies in these countries.

A total of
50%
of respondents identify lack of regional coordination and cooperation as the primary challenge hindering the development of the creative economy at the regional level.

This view is held by the majority of respondents in nine of the 11 countries (all except Myanmar and the Philippines). The absence of effective regional coordination results in inefficient resource allocation, where local governments may neglect funding for creative projects or fail to obtain external support. Additionally, power dynamics can lead to conflicts among stakeholders, undermining the collaboration that is essential for creativity. This fragmentation also creates a disconnect between cultural initiatives and economic outcomes, as regions often fail to recognise culture as a significant economic asset. Collectively, these factors obstruct the growth and sustainability of the creative economy.[39] In contrast, respondents in Myanmar and the Philippines highlight different challenges. One is inadequate infrastructure and the lack of a supportive ecosystem for promoting the creative economy at the regional level. Another is limited access to financing for cultural and creative industries.

37. Thalib, A., et al. (2024). Strategy to increase local economic competitiveness through local wisdom-based creative economy. *Nomico Journal,* (E-ISSN: 3046-6318).
38. Organisation for Economic Co-operation and Development. (2022). *Financing SMEs and entrepreneurs 2022: An OECD scoreboard.* OECD Publishing. Retrieved February 28, 2025, from https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/03/financing-smes-and-entrepreneurs-2022_f1884241/e9073a0f-en.pdf
39. Elmia, A. (2023). Supporting tourism development through creative economy clusters in Lebak District. *Jurnal Kepariwisataan: Destinasi, Hospitalitas dan Perjalanan,* Vol.7 No. 2, 256–270. https://doi.org/10.34013/jk.v7i2.1276

Challenges and opportunities

Based on the survey results, the challenges and opportunities are clear. The challenges found are varied and exist at all levels, from the individual to the system. On the other hand, there are several opportunities from formal education to global trends that could present larger opportunities for the ASEAN creative economies to grow.

Table 4. Challenges, opportunities and implications

Challenges	Implications
Public awareness of the creative economy remains relatively weak (only 21 per cent of respondents are very familiar with the term), making it challenging to build widespread recognition of its value and potential.	This lack of awareness often leads to misconceptions about the sector, resulting in limited public support and reduced opportunities for growth and innovation.
High production costs in the creative industry often lead to high cost perceptions among consumers (53 per cent), which can hinder public consumption of creative goods and services.	This challenge is compounded by limited scalability and access to affordable resources, which restrict the ability of creative businesses to offer competitive pricing.
There is a **varying degree of consumption** across ASEAN countries, with some nations demonstrating relatively high engagement (Indonesia, Malaysia, Myanmar, Thailand and Viet Nam), while others report moderate to low levels of participation in the creative economy (Brunei Darussalam, Cambodia, Lao PDR, Singapore, the Philippines and Timor-Leste).	These disparities highlight the need for targeted strategies related to specific cultural, economic and infrastructural factors influencing consumption patterns in different countries.
There is a significant need to improve **creative thinking and problem-solving, soft skills and marketing and branding** across the region to better equip individuals and businesses for participation in the increasingly digital-driven creative economy.	Creative professionals often produce work that is abstract or subjective, so it may be undervalued or misunderstood if people lack creative thinking skills. Without marketing and communication skills, creative work might not reach the right audience, limiting visibility and impact. Creative workers may fail to articulate the value of their creations to funders, clients or the public.

Challenges	Implications
Support for IP management remains underdeveloped, with gaps in registration processes and commercialisation strategies making it difficult for creative industry players to effectively monetise their works.	This situation discourages innovation and creativity, as creators are often unable to protect their ideas or gain financial returns from their intellectual contributions.
Access to domestic and international markets presents a critical challenge.	These barriers include: 1. a lack of access to financing to promote cultural and creative goods and services 2. a lack of digital capabilities to connect with marketplaces within their country of residence, as well as in the region and globally 3. a lack of market information and the know-how to penetrate overseas markets.
Regional coordination among the ASEAN Member States needs to be strengthened (50 per cent) to create a cohesive and supportive ecosystem for the creative economy, enabling collaboration and shared growth across the region.	A unified approach would allow for the pooling of resources, the sharing of best practices and the establishment of regional standards to elevate the overall competitiveness of ASEAN's creative industries.

Opportunities	Implications
Formal educational institutions are perceived to be actively supporting the cultural and creative sectors, with more than half of respondents affirming the presence of relevant programmes in schools and colleges. **53%**	Harness these education systems to foster innovation hubs and incubators within universities, connecting students with industry mentors and resources to turn their ideas into market-ready creative products. Collaborate with educational institutions to design tailored programmes that respond to emerging trends in the creative economy, such as digital storytelling, AI-driven design and sustainability in creative production.
Internet and social media are the main channels for citizens to obtain information as well as for Creative Players to promote their works. **52%**	Develop regional platforms or digital marketplaces to connect ASEAN Creative Players with a global audience, enabling seamless promotion and sales of creative works. Use data analytics tools to understand consumer preferences and optimise online campaigns, driving higher engagement and fostering brand loyalty.
Local wisdom and culture significantly affect the development of creative and cultural products and services. **54%** This could be a good foundation to shape the uniqueness of each country's creative economy.	Integrate local traditions and cultural narratives into modern creative products, such as digital content, fashion and design, to create offerings that stand out in global markets. Promote cultural tourism by developing high-tech and immersive experiences that combine local crafts, storytelling and technology, attracting both domestic and international visitors.

Conclusion

These results – drawn from surveys conducted both in society generally and among Creative Players specifically – show certain patterns and could be categorised into clusters to identify the similarities and differences between countries in the region.

The clustering was undertaken by examining the degree of public awareness, the importance of specific skills and knowledge, the ease of obtaining support for IP, perceptions of infrastructure, and perceptions of business support between countries in the region.

Three possible clusters have been identified according to their distinct characteristics. Responding to these variations through targeted policies and initiatives will be crucial for boosting the overall resilience and sustainability of the region's creative economy.

Cluster 1
This comprises countries that demonstrate high awareness of creative products. They possess comprehensive infrastructure, with supportive policies and institutions for creative industries. Additionally, the diversity of their range of creative sectors promotes innovation and entrepreneurship, highlighting the sector's importance for economic growth.[40] Countries in this cluster are also characterised by offering easy access to support, for both IP- and business-related needs.

Cluster 2
This includes countries with rapidly expanding creative sectors, marked by significant increases in the trade of creative goods. This trend indicates a rising interest in creative trade. Governments in this cluster are recognising the importance of the creative economy and are implementing initiatives to incorporate it into national development strategies.[41] Support for upskilling and infrastructure are perceived as broadly sufficient but with room for improvement.

Cluster 3
These countries face major challenges in developing their creative economies, including inadequate infrastructure, restrictive policies and low market engagement with minimal regional trade contributions.[42] These countries are characterised by a lower level of awareness. Crucial improvements to skills and infrastructure are needed. The players also perceive a lack of IP management and business support available in their area.

Details of these three clusters are provided in Table 5.

40. Asian Development Bank Institute. (2020). *Creative economy 2030: The Asian way of creative economy.* Retrieved February 28, 2025, from https://www.adb.org/sites/default/files/publication/804501/adbi-creative-economy-2030.pdf
41. ASEAN Secretariat. (2021). Mapping the readiness of ASEAN's creative ecosystem. *The ASEAN Magazine.* Retrieved February 28, 2025, from https://theaseanmagazine.asean.org/article/mapping-the-readiness-of-aseans-creative-ecosystem/
42. Universitas Muhammadiyah Yogyakarta. (n.d.). *Chapter II: Creative economy development in South East Asia* [PDF]. UMY Repository. Retrieved February 28, 2025, from https://repository.umy.ac.id/bitstream/handle/123456789/29595/6.%20CHAPTER%20II.pdf?sequence=6&isAllowed=y

Table 5. General Public and Creative Players perceptions of the creative economy

	Cluster 1	Cluster 2	Cluster 3
Country identified	Indonesia Singapore Malaysia	Thailand Philippines Viet Nam Myanmar	Cambodia Timor-Leste Brunei Darussalam Lao PDR
Degree of public awareness	Very familiar	Somewhat familiar	Somewhat familiar
Importance of specific skills/ knowledge	A small number of skills are considered very important	Several skills are considered very important	Several to all skills are considered very important
Ease of getting support for IP	All easy to neutral	The majority are neutral	Majority are neutral, difficult or do not know
Perception of infrastructure	A small number of infrastructures are considered very important	Several infrastructures are considered very important	Several to all infrastructures are considered very important
Perception of business support	All easy to neutral	The majority are neutral	The majority are neutral, difficult or not available

Recommendations

Support for countries to develop their creative economies

The creative economy holds immense potential as a driver of economic growth, cultural preservation and social innovation. However, realising this potential requires countries to implement targeted strategies that respond to existing gaps and challenges. Table 6 presents recommendations to improve public awareness, production costs, consumption, skills, IP management, market access and regional coordination.

Table 6. Proposed strategies to improve the creative economy

Important elements to focus on:	Strategies
Public awareness	• Implement targeted awareness campaigns, such as Indonesia's #belilokal creatives programme, to promote local creative products. • Organise events such as design weeks, writers' festivals and arts festivals to promote creative industries. • Celebrate an annual Creativity Day to raise public awareness about the potential of culture and creative industries.
Production costs	• Focus on the development of local raw materials to decrease distribution costs from imported materials. Start to create a closed loop creative industry ecosystem. • Create industry clusters that help players form partnerships with complementary local businesses to share resources, reduce costs and expand market reach. • Provide a shared production centre to reduce overhead costs associated with maintaining a dedicated facility.
Consumption	• Develop local strategies and programmes to promote cultural and creative industries. • Establish creative hubs and districts to foster a vibrant creative ecosystem. • Require the government to be the main consumer and promoter of local creative products. • Encourage collaboration between local creative brands and big brands entering ASEAN countries. • Make creative products available through various channels within easy reach of consumers. • Establish structured funding facilities, including loans, credit guarantees, grants and venture capital financing, to help creative businesses reach wider audiences.

Important elements to focus on:	Strategies
Creative thinking and problem-solving, soft skills and marketing and branding skills	• Implement creative thinking and problem-solving, soft skills and marketing and branding skills training programmes for creative professionals. • Partner with UK educational institutions to integrate advanced tools into creative curricula. • Establish online learning platforms offering courses for the creative sector.
IP management	• Simplify and expedite the IP registration process, making it more accessible for creative professionals. • Establish country-wide centres dedicated to helping creative professionals commercialise their IP and offering guidance on licensing, partnerships and market entry strategies. • Develop and distribute sector-specific IP guides tailored to different creative industries and their unique challenges and opportunities. • Develop region-wide guidelines for IP management, covering the entire lifecycle from registration to commercialisation. This would provide a standardised approach for creative professionals across ASEAN. • Implement harmonised IP valuation practices across ASEAN, as mentioned in the ASEAN Intellectual Property Rights Action Plan 2016–2025. This would help creators better understand the value of their IP assets and monetise them.
Access to domestic and international markets	• Harness digital platforms to present and sell creative products globally. • Participate in international creative industry events and trade fairs. • Develop export promotion programmes specifically for creative goods and services. • Develop platforms to increase access to market information and know-how to tap overseas markets, including access to finance market expansion.
Regional coordination	• Establish an ASEAN Creative Education Alliance to enable knowledge sharing and Creative Players' exchanges. • Develop joint degree programmes between ASEAN institutions in creative fields. • Create regional innovation hubs focusing on creative economy development and cross-cultural practices.

Support for the creative economy by sector

The challenges and opportunities identified are multi-faceted and exist on all levels, from the individual to the system. The survey results also highlight opportunities that the region could tap into, especially for improving formal education for creative economic development and global trends that could present opportunities for the ASEAN's creative economies to grow. The support needed in terms of skill development, ecosystem or infrastructures for each sector is explained in Table 7.

Table 7. Support for skill development and ecosystem or infrastructure by sector

Creative economy sector (by output)	Skills needed*	Ecosystem and infrastructure needs*
Fashion design and clothing technology	Marketing and branding (to promote creative work) Digital tools	Events
Built environment (architecture, building design, landscape design, urban design and planning, interior design)	Digital tools Creative thinking and problem-solving techniques	Recreational parks, gardens and streetscapes
Film, video and photography	Digital tools Marketing and branding (to promote creative work)	Museums, galleries and exhibition spaces Events
Television and radio (broadcast and podcast)	Soft skills (e.g. communication and teamwork) Marketing and branding (to promote creative work)	Events
Performing arts (music, dance, theatre)	Soft skills (e.g. communication and teamwork) Storytelling and content creation Emerging technologies (e.g. VR/AR, blockchain, generative AI)	Events Museums, galleries and exhibition spaces
Literature and publishing	IP rights Soft skills	Events

Creative economy sector (by output)	Skills needed*	Ecosystem and infrastructure needs*
Advertising and marketing	Soft skills (e.g. communication and teamwork) Creative thinking and problem-solving techniques	Events High-speed internet areas for digital creation
Visual arts and crafts	Marketing and branding (to promote creative work) Business skills	Digital and physical marketplaces (for presenting work)
Animation and video games	Digital tools Creative thinking and problem-solving techniques IP rights	Museums, galleries and exhibition spaces High-speed internet areas for digital creation Makerspaces
Design (product, furniture, graphic, etc.)	Digital tools Emerging technologies (e.g. VR/AR, blockchain, generative AI) Creative thinking and problem-solving techniques	Events Digital and physical marketplaces (for presenting work)
IT, software and computer services	Digital tools IP rights	Makerspaces High-speed internet areas for digital creation
Gastronomy/culinary	Marketing and branding (to promote creative work) Business skills	Digital and physical marketplaces (for presenting work)

**data represents the highest frequency responses from the respondents*

Policy recommendations

The survey results highlight significant implications for ASEAN policymakers, emphasising the need for a unified approach to tackle these regional challenges. Below are policy recommendations arising from the top five survey results.

A. The top three uses of technology in the creative sectors value chain are rated higher on certain processes, which are: design, marketing and promotion, and production purpose. However, technology is not limited to these commonly used areas. It can also support the creative process in other stages throughout the value chain. This implies that technology adoption should be introduced more broadly to all phases of the creative process.

Policy recommendations for the ASEAN region to consider:

1. Introduce technology usage to other stages in creative industries through technology adoption training. For example:
    a. pre-production/ideation/concept development: digital storyboarding and design platforms, generative AI tools for brainstorming, 3D scanning and virtual modeling
    b. production (creation of works or products): digital content creation software, 3D printing and CNC machines (for fashion, product design, crafts), virtual production systems, music and audio production tools, augmented reality/virtual reality (AR/VR) tools for immersive creation (e.g., Unity, Tilt Brush)
    c. post-production: photo/video editing software, digital asset management systems, animation and visual effects, quality assurance automation tools
    d. distribution (tangible and intangible products)
        i. for tangible products: e-commerce platforms, logistics and fulfilment tech, inventory management systems
        ii. for intangible products: streaming and content platforms, NFT marketplaces, digital publishing platforms
    e. marketing and promotion: social media management tools, targeted advertising platforms, influence and affiliate marketing platforms, analytics tools, AI-driven copywriting and visuals.

2. Revise curricula in collaboration with educational institutions, technology experts and creative practitioners, ensuring the integration of advanced tools and emerging technologies within creative and design education.

3. Establish ongoing professional development programmes to support region-wide training initiatives, enabling creative professionals to stay abreast of the latest technological advancements relevant to their disciplines.

Policy recommendations for the ASEAN region to consider:

4. Introduce targeted grants for creative enterprises and independent practitioners, facilitating investment in state-of-the-art design technologies and digital tools.
5. Host regular technology showcases at ASEAN-wide events, highlighting the latest innovations and demonstrating their practical applications across various creative industry sectors.
6. Allocate dedicated funding for research and development in creative-related technologies, including AI-assisted design software and immersive virtual reality platforms.
7. Set up regional innovation hubs that focus on the convergence of technology and creative design, providing collaborative spaces for experimentation and cross-sectoral innovation.
8. Develop a unified ASEAN digital collaboration platform where creative professionals can connect, exchange knowledge and resources and exhibit their creative outputs to regional and global audiences.
9. Formulate ASEAN-wide guidelines for IP (IP) management, encompassing the entire lifecycle—from registration and protection to commercial exploitation—thereby offering a standardised and coherent framework for creative practitioners throughout the region.

Policy recommendations for the ASEAN–UK partnership to consider:

1. Establish a network of digital design incubators across ASEAN countries, drawing on UK expertise in creative technology.
2. Create a fellowship programme to enable ASEAN designers to spend time in UK design studios and tech companies, learn advanced digital design techniques and emerging technologies and bring knowledge back to their home countries to foster innovation.
3. Organise a series of workshops focused on integrating AI into the design process.
4. Launch an annual competition that challenges ASEAN designers to solve regional problems using technology.
5. Create a programme focused on sustainable design practices using technology.

B. More than half of the respondents (54 per cent) indicated that the influence of local wisdom/culture on the development of creative and cultural products was impactful. This suggests that the ASEAN Member States have been reasonably successful in integrating local cultural elements. Such efforts should be sustained and, where possible, further enhanced to ensure even broader inclusion.

Policy recommendations for the ASEAN region to consider:

1. Digital documentation initiative: launch a region-wide programme to digitally document and archive local wisdom and cultural practices across ASEAN.
2. Cultural exchange programmes: establish regular cultural exchange programmes among the ASEAN Member States, focusing on traditional arts, crafts and cultural practices, to foster cross-cultural understanding and inspiration.
3. Mentorship programmes: create a mentorship network which pairs emerging creative talents with established artists and designers who successfully integrate local culture.
4. Digital platforms: develop a regional digital platform to present and market products that incorporate local wisdom, helping to connect creators with potential buyers across ASEAN and globally.
5. Cross-sector partnerships: encourage collaborations between traditional artisans and modern designers to create innovative products that blend local wisdom with contemporary aesthetics.
6. Cultural tourism initiatives: develop cultural tourism programmes that highlight local wisdom and creative products, creating demand and awareness for culturally inspired goods.

Policy recommendations for the ASEAN–UK Partnership to consider:

1. Provide mentorship and funding for entrepreneurs developing products based on local cultural elements.
2. Offer training on how to scale culturally inspired businesses while maintaining authenticity.
3. Build connections with UK markets interested in unique ASEAN cultural products.
4. Provide training in ethnographic research methods for young people in ASEAN countries.
5. Document and digitise local wisdom and cultural practices across ASEAN.
6. Create an accessible digital archive for creative professionals to draw inspiration from.

C. The three training areas rated as most important by respondents are creative thinking, soft skills such as communication and teamwork, and marketing. These findings suggest that support organisations in the creative ecosystem - such as government bodies, educational institutions and industry associations - should prioritise offering training in these areas. Doing so will help ensure that creative workers gain meaningful benefits and can make a greater impact in their respective fields.

Policy recommendations for the ASEAN region to consider:

1. Develop targeted training programmes tailored to the specific needs of different creative industry sectors, with a focus on enhancing creative thinking, soft skills and marketing competencies relevant to each domain.
2. Design a comprehensive creative thinking curriculum applicable across all creative industry subsectors, emphasising the development of original idea generation, multi-perspective problem solving and adaptive thinking through techniques such as brainstorming, role play and scenario-based exercises.
3. Strengthen the capacity of government agencies and supporting institutions to design, implement and evaluate skills development initiatives, particularly those centred on creative thinking, soft skills and marketing expertise.
4. Foster ASEAN-wide collaboration through the exchange of best practices, joint training initiatives and cross-border mobility programmes aimed at advancing regional talent development and facilitating knowledge sharing among creative professionals.
5. Promote lifelong and life-wide learning by expanding access to flexible, modular and digital learning formats – such as micro-credentials, online courses and blended learning models – that enable creative workers to continuously upgrade their skills throughout their careers.
6. Ensure that training resources are discoverable and accessible, particularly for marginalised groups including women, young people and rural communities, to support inclusive and equitable participation in the creative economy.
7. Enhance support for marketing skills and creative enterprise development by offering tailored training and mentorship schemes to empower creative professionals and entrepreneurs in accessing new markets and building resilient, sustainable businesses.

Policy recommendations for the ASEAN–UK Partnership to consider:

1. Establish a virtual academy focused on digital tools training for creative professionals that:
   a. offers courses on industry-specific software and emerging technologies
   b. provides certification programmes recognised across ASEAN and the UK
   c. enables virtual internships with UK creative companies.

2. Support the adaptation of popular digital tools for ASEAN markets by:
   a. collaborating with software companies to develop localised versions of creative software
   b. creating tutorials and resources in ASEAN languages
   c. developing plug-ins and add-ons tailored to the needs of ASEAN creative industries.

D. 53 per cent of the respondents stated that creative and cultural programmes are still dominated by formal education (in the form of degree and non-degree programmes). On one hand, this shows that creative and cultural programmes have been formally acknowledged. On the other hand, this could mean that creative programmes are too exclusive.

Policy recommendations for the ASEAN region to consider:

1. ASEAN creative education framework: develop a comprehensive framework for creative and cultural education that can be adopted by the ASEAN Member States to ensure consistency and quality across the region.
2. Industry–academia collaboration: encourage partnerships between educational institutions and creative industries to develop curricula that align with market needs and emerging trends.
3. ASEAN creative education network: establish a network of universities and colleges offering creative and cultural programmes to enable knowledge sharing and student exchanges.
4. Joint degree programmes: promote the development of joint degree programmes between ASEAN institutions to enhance regional integration and cultural understanding.
5. ASEAN quality assurance for creative education: implement a regional quality assurance system specifically tailored to creative and cultural education programmes.
6. Standardised accreditation: develop standardised accreditation criteria for creative and cultural programmes across ASEAN to ensure consistent quality.
7. Faculty development programmes: initiate region-wide training programmes for educators in creative and cultural fields to enhance teaching methodologies and keep them updated on industry trends.
8. Industry advisory boards: encourage educational institutions to establish advisory boards with industry professionals to ensure curriculum relevance.

Policy recommendations for the ASEAN–UK Partnership to consider:

1. Establish a network of universities and colleges from the UK and the ASEAN Member States to:
    a. develop joint degree programmes in creative and cultural fields
    b. enable student and faculty exchanges
    c. collaborate on curriculum development and research projects.

2. Implement a cross-border apprenticeship programme that:
    a. pairs ASEAN students with UK creative companies for practical work experience
    b. offers formal qualifications recognised in both regions
    c. provides mentorship from UK industry professionals.

3. Establish joint research centres focusing on:
    a. innovation in creative education methodologies
    b. cross-cultural creative practices and their impact on economies
    c. technology applications in creative industries.

E. Respondents rated the websites of relevant organisations, blogs and podcasts as better channels to find information about the creative economy than social media. This indicates that information in the creative economy is highly segmented and focused into certain audiences.

Policy recommendations for the ASEAN region to consider:

1. ASEAN creative economy portal: develop a comprehensive online platform dedicated to the creative economy, serving as a central hub for information, resources and opportunities across ASEAN.
2. Social media strategy: implement a robust social media strategy to disseminate information and engage with creative professionals, using popular platforms such as Facebook, Instagram and X.
3. Webinar series: organise regular webinars featuring industry experts, successful creatives and policymakers, to share insights and best practices.
4. Digital analytics dashboard: create a real-time analytics platform to track trends, market demands and growth opportunities in the creative economy across ASEAN.
5. Open data initiative: encourage the ASEAN Member States to share relevant creative economy data through open APIs, fostering research and innovation.

Policy recommendations for the ASEAN–UK Partnership to consider:

1. Develop a user-friendly AI-driven tool for policymakers and creative professionals that aggregates and analyses creative economy data from various online sources and provides:
   a. real-time insights and trends specific to ASEAN
   b. predictive analytics to help inform policy decisions.
2. Develop a comprehensive online platform, tailored to ASEAN, that:
   a. curates high-quality content from various sources, including UK expertise, serving as a one-stop resource for creative economy information
   b. provides interfaces in different ASEAN languages
   c. offers interactive features like forums and live Q&A sessions with experts.

Appendix 1: General Public data

Profile

Respondents in the General Public category stated their gender as male (47 per cent), female (51 per cent) and undisclosed (one per cent). The majority were in the age range of 25 to 34 years (29 per cent), and six per cent identified as D/deaf, disabled or neurodivergent.

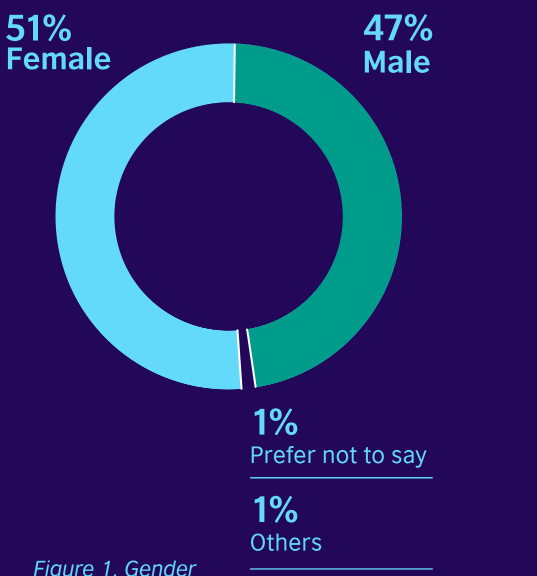


Figure 1. Gender

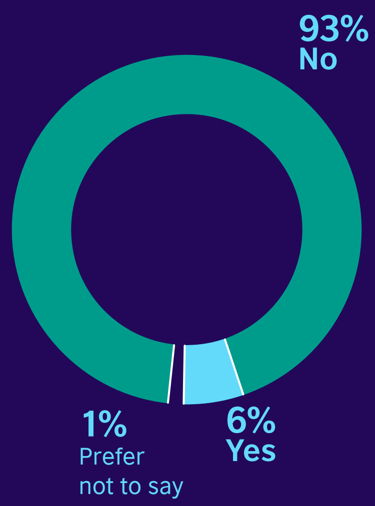


Figure 3. Identify as a D/deaf, disabled or neurodivergent people

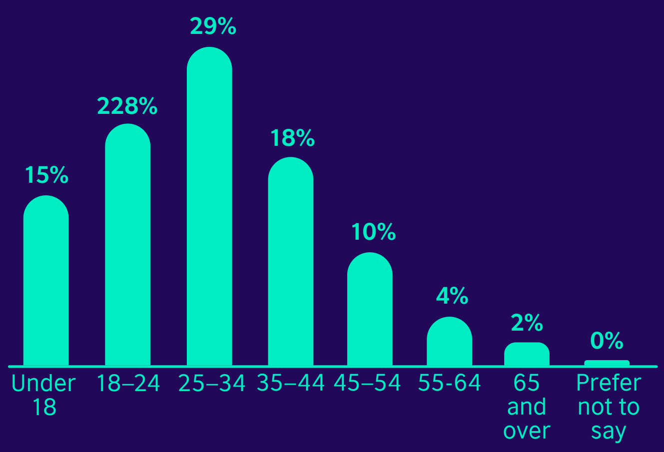


Figure 2. Age range

Awareness and perception

Overall, the public is somewhat familiar with the term 'creative economy', with a 47 per cent rate. Only six per cent of respondents indicated that they are not acquainted with this term.

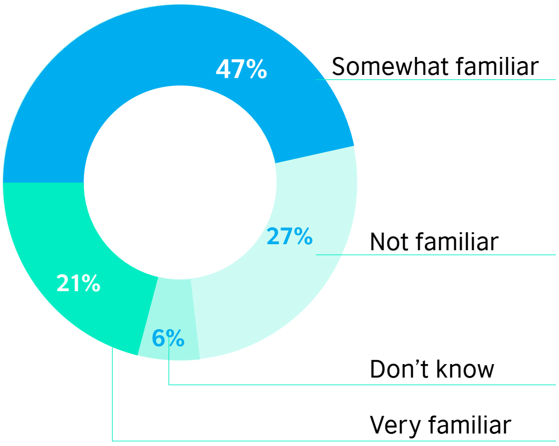


Figure 4. Awareness with the term 'creative economy'

The creative economy consists of several industries. According to public perception, the most prominent industries within the creative economy are:

- fashion design and clothing technology
- film, video and photography
- visual arts and crafts.

Despite being part of the creative economy, the following industries are the least connected to the public's understanding of the term:

- IT, software and computer services
- gastronomy
- literature and publishing.

Table 1. Proportion of creative economy industry

Industries that are part of the creative economy	Number	Rank
Fashion design and clothing technology	1,085	1
Film, video and photography	984	2
Visual arts and crafts	912	3
Design (product, furniture, graphic, etc.)	905	4
Performing arts (music, dance, theatre)	898	5
Built environment (architecture, building design, landscape design, urban design and planning, interior design)	857	6
Animation and video games	794	7
Advertising and marketing	789	8
Television and radio (broadcast and podcast)	666	9
IT, software and computer services	646	10
Gastronomy/culinary	624	11
Literature and publishing	590	12
Others (please specify)	3	13

In seeking information about creative economy development in ASEAN, the majority of the public (64 per cent) uses the internet (such as websites of relevant organisations, blogs or podcasts). Only two per cent (respectively) of the public relies on special interest groups (such as trade organisations or craft guilds) and industry reports/academic journals and publications.

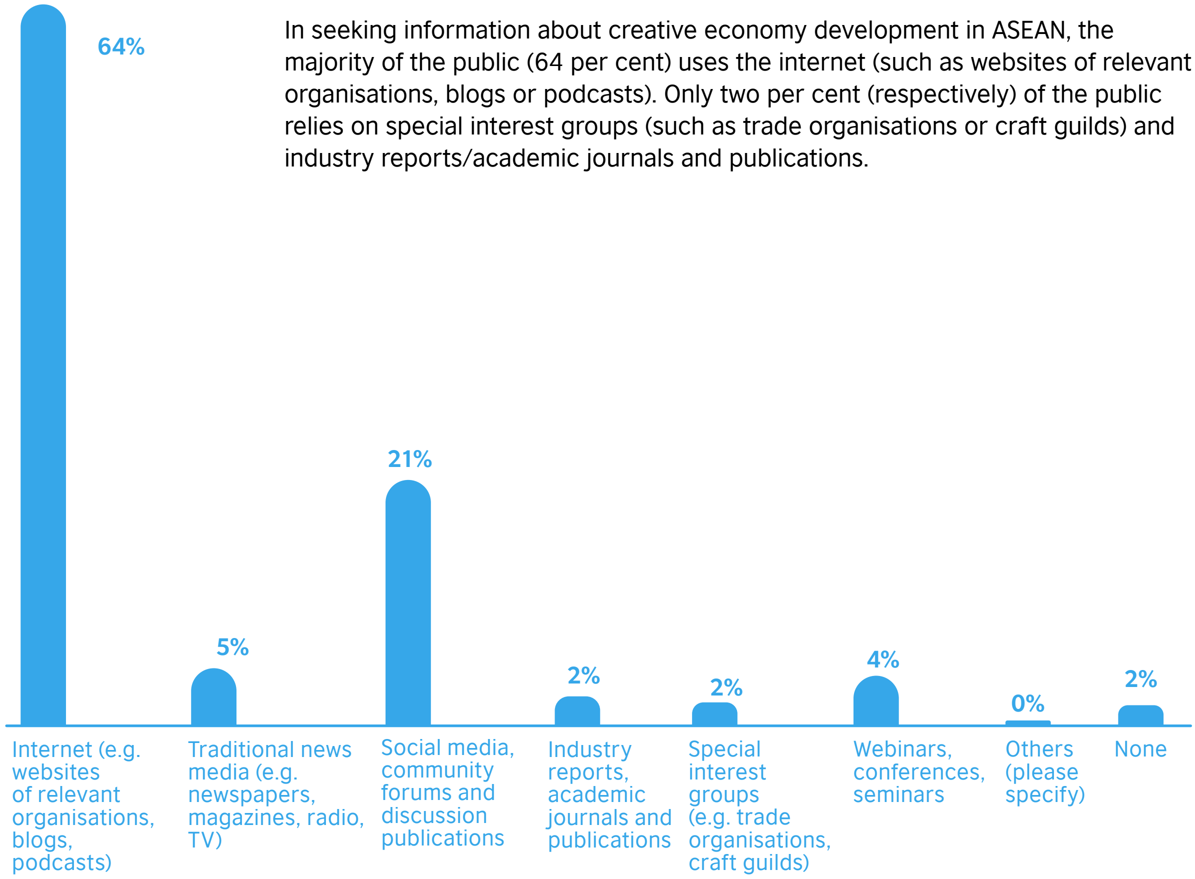


Figure 5. Information medium

On average, the public perceives that the creative economy **plays an important role** in the economic, socio-cultural, sustainable and inclusive development of ASEAN as a whole.

Table 2. Proportion of creative economy industry

Likert	Value	Mean range
Very unimportant	0	0.00
Very unimportant	1	0.001–1.00
Very unimportant	2	1.01–2.00
Not important	3	2.01–3.00
Not important	4	3.01–4.00
Neutral	5	4.01–5.00
Neutral	6	5.01–6.00
Important	7	6.01–7.00
Important	8	7.01–8.00
Very important	9	8.01–9.00
Very important	10	9.01–10.00
Likert	**Value**	**Mean range**
Important	6.08	6.01–7.00

The majority of respondents (60 per cent) describe the current state of the creative economy in the ASEAN region as ‘growing’. Meanwhile, seven per cent of the public are unable to articulate their understanding of the current position of the creative economy in ASEAN.

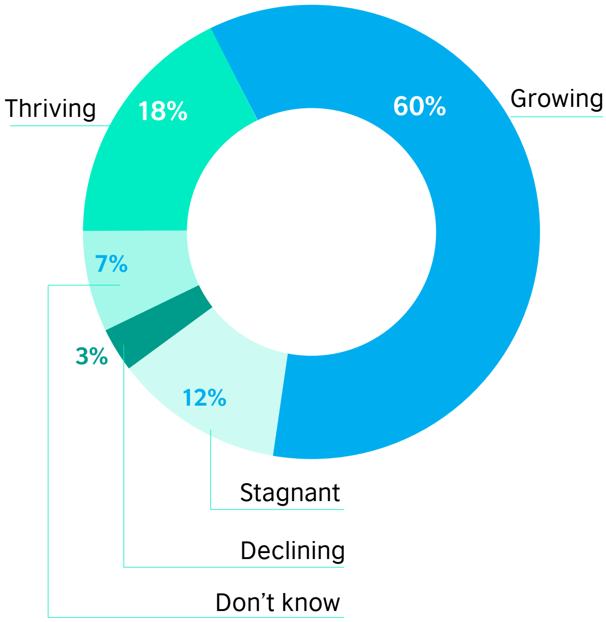


Figure 6. Perception

Developing the creative economy at the ASEAN regional scale presents several challenges. Major obstacles include:

- regional coordination and cooperation to advance the creative economy collectively
- access to financing
- infrastructure and a conducive ecosystem at the regional level to advance the creative economy.

Table 3. Main challenges facing the development of the creative economy facing the development of the creative economy

Main challenges	Count	Rank
Lack of regional coordination and cooperation to promote the creative economy collectively	800	1
Lack of access to financing for the cultural and creative industries	736	2
Lack of infrastructure and a conducive ecosystem at the regional level to promote the creative economy	698	3
Lack of capacity building and talent development for the cultural and creative industries	588	4
Competing priorities of respective ASEAN Member States in developing the creative economy	541	5
Lack of proper data, industry classifications and definitions of the creative economy	504	6
Lack of a conducive environment for transmission of knowledge and expertise within the cultural and creative industries	479	7
Lack of proper IP (IP) safeguards in place	306	8
Others (please specify)	4	9

The development of the creative economy is expected to yield significant benefits for its ecosystem. There is a strong belief that the creative economy provides advantages at a regional level, especially in economic growth (43 per cent) and better quality of life (22 per cent). However, the public feels that the creative economy has yet to effectively respond to issues related to gender equality and its contributions towards the United Nations Sustainable Development Goals (SDGs) (1 per cent).

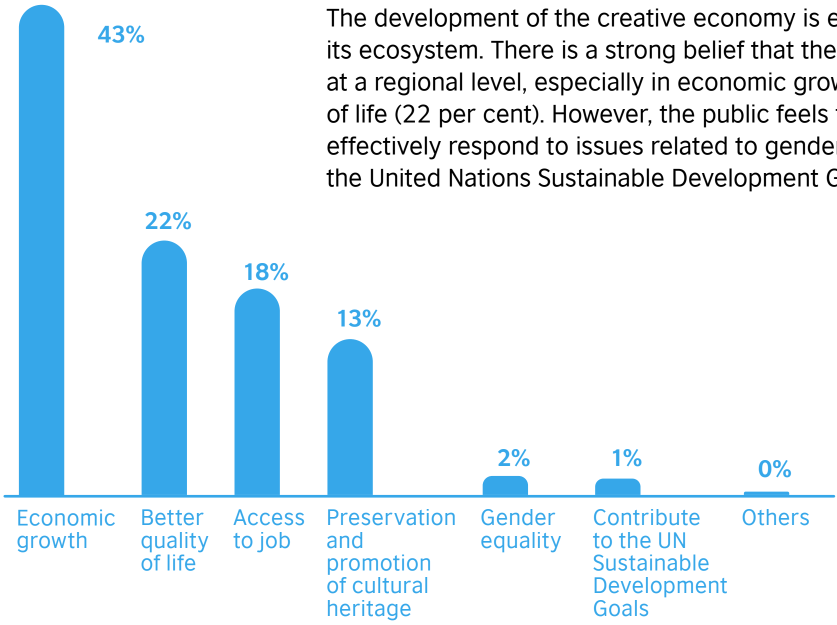


Figure 7. Global issues effectively addressed by the Creative Economy

Respondents also believe they benefit significantly from the regional ASEAN creative economy, particularly through access to creative and cultural products and services from other ASEAN countries (30 per cent). However, only 12 per cent of the public believe that the creative economy gives individuals and communities a greater appreciation for the cultural and creative strengths of other ASEAN countries.

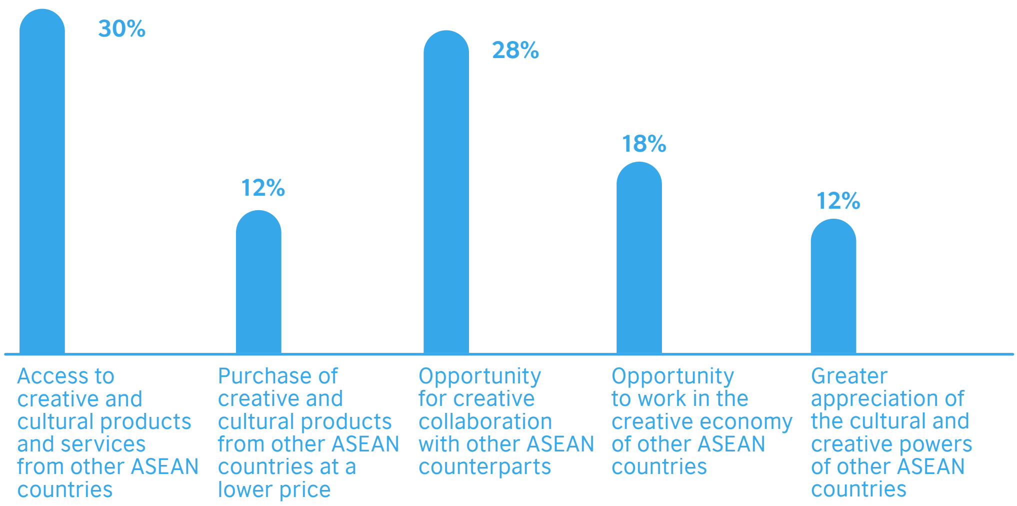


Figure 8. How do individuals and communities benefit from a vibrant and dynamic integrated ASEAN creative economy

To enhance the ASEAN creative economy, it is essential to prioritise several major initiatives:

- increasing public awareness about the creative economy
- fostering greater regional coordination and cooperation among ASEAN countries
- collecting and analysing data to inform policymaking
- promoting the development of cultural and creative enterprises
- directing investments into the creative economy.

By focusing on these areas, ASEAN can effectively position itself as an attractive regional destination for the creative economy.

Table 4. ASEAN prioritise to make ASEAN as an attractive regional destination

RANK		1		2		3		4		5		TOTAL
	Average rank	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent	
Greater regional coordination and cooperation to promote the creative economy	2.58	349	33.43%	188	18.01%	193	18.49%	177	16.95%	137	13.12%	1,044
Awareness-building in promoting the ASEAN creative economy	2.57	240	27.43%	249	28.46%	146	16.69%	131	14.97%	109	12.46%	875
Collecting data for analysis to inform policymaking	2.93	125	16.71%	175	23.40%	193	25.80%	135	18.05%	120	16.04%	748
Harmonising job and industry classifications across the region	3.14	93	13.40%	137	19.74%	166	23.92%	177	25.50%	121	17.44%	694
Promoting cultural and creative enterprise development	2.97	173	19.01%	214	23.52%	177	19.45%	158	17.36%	188	20.66%	910
Promoting regional market access	3.07	118	19.50%	95	15.70%	129	21.32%	150	24.79%	113	18.68%	605
Directing investments into the creative economy	3.05	131	18.42%	144	20.25%	144	20.25%	143	20.11%	149	20.96%	711
Providing skills training for cultural and creative workers	3.13	146	19.49%	124	16.56%	150	20.03%	148	19.76%	181	24.17%	749
Enhancing social security for the informal sector workers	3.29	58	13.49%	73	16.98%	95	22.09%	96	22.33%	108	25.12%	430
Fostering digital adoption for cultural and creative industries	3.38	57	11.70%	87	17.86%	100	20.53%	98	20.12%	145	29.77%	487
Working towards net zero transition for cultural and creative industries	3.38	41	13.27%	55	17.80%	43	13.92%	85	27.51%	85	27.51%	309

Notes:
1 = Number and percentage of respondents who rank the variable as the most important
2 = Number and percentage of respondents who rank the variable as the second most important
3 = Number and percentage of respondents who rank the variable as the third most important
4 = Number and percentage of respondents who rank the variable as the fourth most important
5 = Number and percentage of respondents who rank the variable as the fifth most important

Consumption and support

Members of the public report engaging **frequently** with products and services from the creative economy, such as watching local films, streaming videos, listening to music, purchasing books and acquiring local crafts.

Table 5. Consumption

Likert	Value	Mean range
Very often	1	1.00–1.74
Sometimes	2	1.75–2.49
Rarely	3	2.50–3.24
Never	4	3.25–4.00
Likert	**Value**	**Mean range**
Very often	1.61	1.00–1.74

Quality and price are the most influential factors affecting purchasing decisions. Meanwhile, supporting local businesses is considered to have less impact on purchasing decisions.

Table 6. Factors that influence the decision to support

Factors	Count	Rank
Quality	1,021	1
Price	843	2
Availability/accessibility	734	3
Originality/uniqueness	695	4
Cultural significance	624	5
Support local businesses	543	6
Other	124	7

The primary barriers preventing the public from consuming more creative products or services from ASEAN are high costs and limited access or availability. Members of the public do not perceive the influence of or preference for international brands as a significant obstacle to consuming more creative products or services from ASEAN compared with other challenges.

Table 7. Barriers to consuming creative products and services

The biggest barriers	Count	Rank
High cost	826	1
Limited access/availability	817	2
Lack of awareness	754	3
Product is not attractive	615	4
Language barrier	539	5
Low quality	518	6
Preference for international brands	356	7
Other (please specify)	2	8

Appendix 2:
Creative Players data

Profile

Respondents in the Creative Players category stated their gender as female (47 per cent), male (51 per cent) and undisclosed (1 per cent). The majority were in the age range of 25 to 34 years (44 per cent). Most (91 per cent) did not identify as D/deaf, disabled or neurodivergent.

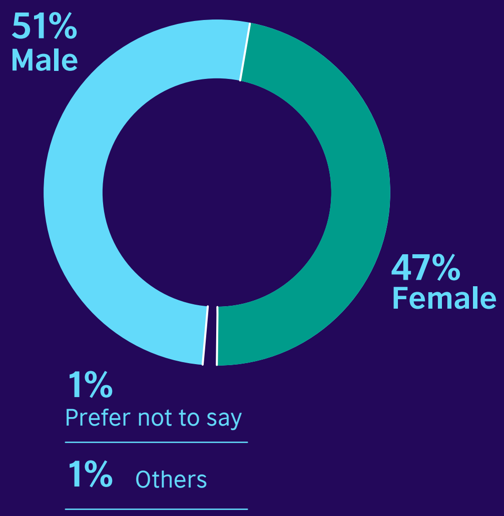


Figure 9. Gender

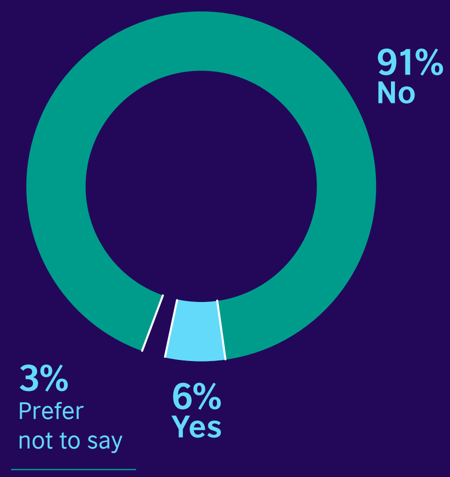


Figure 11. Identify as a D/deaf, disabled or neurodivergent person

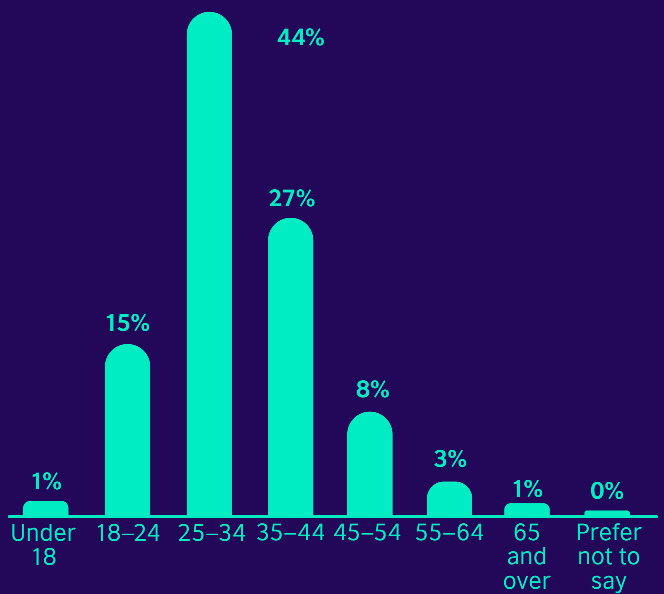


Figure 10. Age range

The majority of respondents are freelancers/gig workers (42 per cent) and employees in micro-, small or medium-sized enterprises (with fewer than 100 employees) (25 per cent).

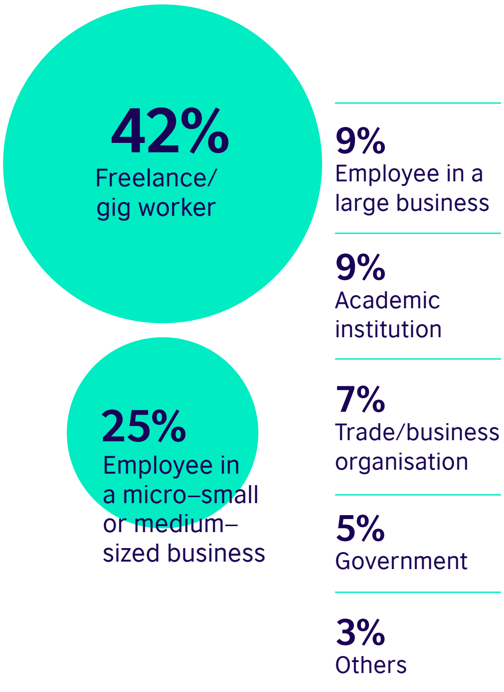


Figure 12. Organisational affiliation

Based on their status, half of the respondents are professionals (primary income from creative work, high skill) (50 per cent).

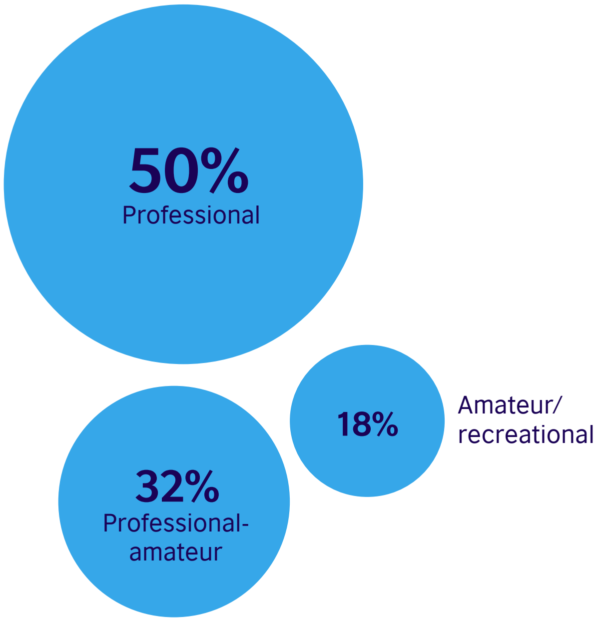


Figure 14. Status

Based on their role and designation, most respondents are creative practitioners (45 per cent) and business owners (18 per cent).

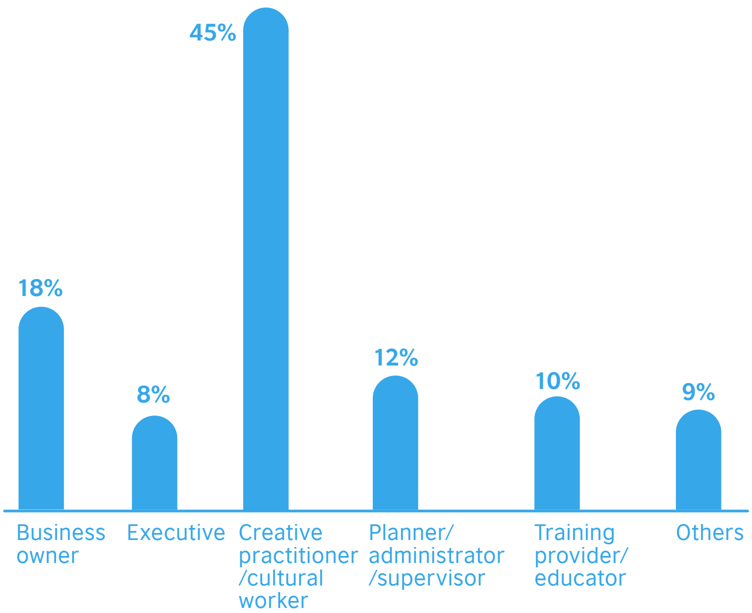


Figure 13. Role and designation

Based on their nature of engagement, most respondents are individual/personal enterprises (48 per cent).

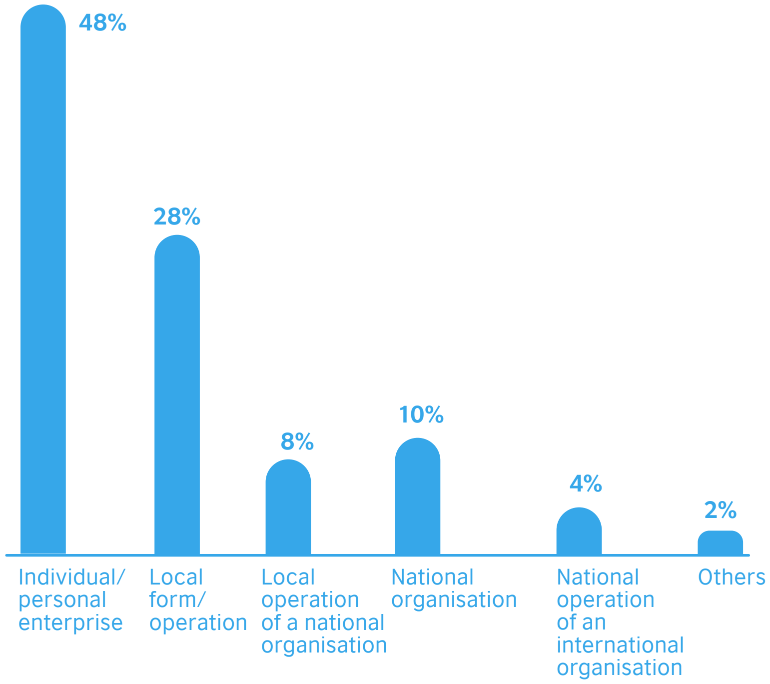


Figure 15. Nature of engagement

Most of them are producing visual art and crafts (21 per cent).

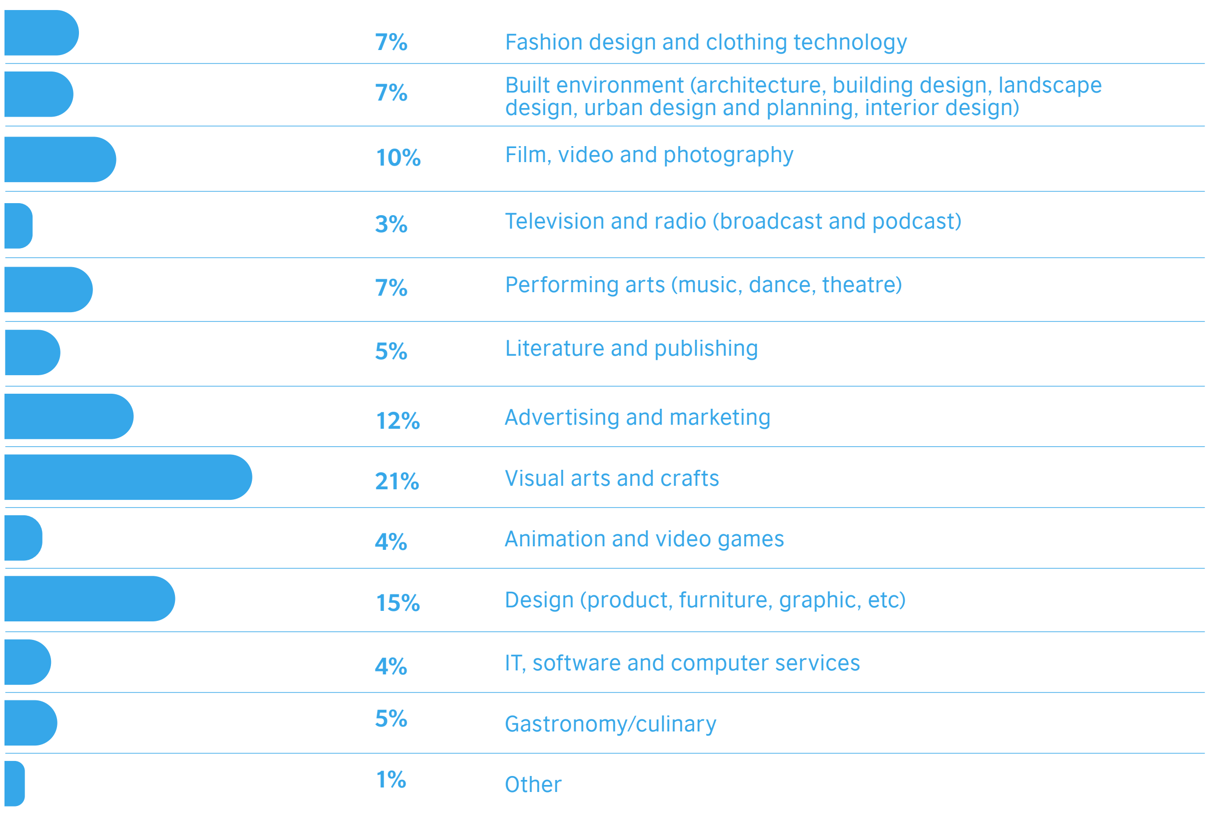


Figure 16. Type of creative outputs

Microsystem

The majority of Creative Players (87 per cent) believe that government-led capacity-building initiatives can enhance their skill sets.

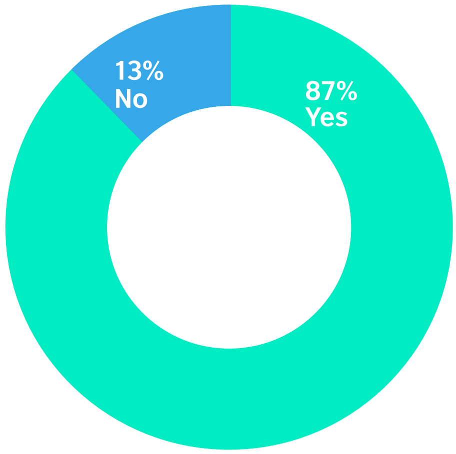


Figure 17. Impact of government capacity-building and skills training on skillsets and competitiveness of Creative Players category

Of the respondents, 34 per cent believe that both governments and various non-governmental organisations collectively provide opportunities for training and development aimed at improving skillsets and enhancing the competitiveness of Creative Players. Despite extensive facilities, four per cent of Creative Players still feel that they do not have opportunities for training and development to enhance their skills and competitiveness.

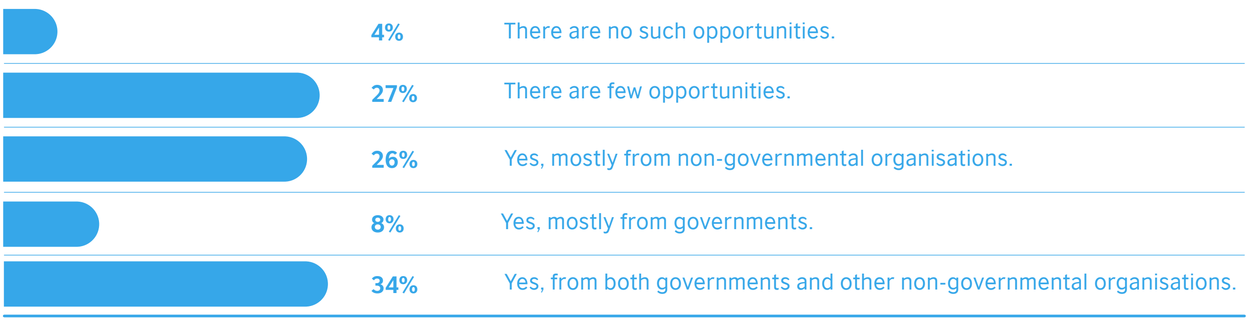


Figure 18. Opportunities for training and development to improve skillsets and enhance competitiveness

According to Creative Players, all skills/knowledge are considered very important for the creative field.

Table 8. Important skills/knowledge

Skills/knowledge learned and how important it is	Mode
Digital tools (e.g. Photoshop, Canva, 3ds Max, Audacity, Logic Pro, GarageBand, etc.)	Very important
Soft skills (e.g. communication and teamwork)	Very important
Business skills	Very important
Creative thinking and problem-solving techniques	Very important
Marketing and branding (to promote creative work)	Very important
Understanding intellectual property (IP) rights	Very important
Storytelling and content creation	Very important
Emerging technologies (e.g. VR/AR, blockchain, generative AI)	Very important
Other	Neutral

Research and education play an important role in fuelling the creative economy through the commercialisation of innovations.[43] Based on experience, 46 per cent of Creative Players believe that the curricula in schools and universities in their countries meets the needs and trends of the cultural and creative industries. Conversely, 28 per cent of Creative Players express uncertainty as to whether educational curricula related to their fields adequately respond to the demands and trends of these industries.

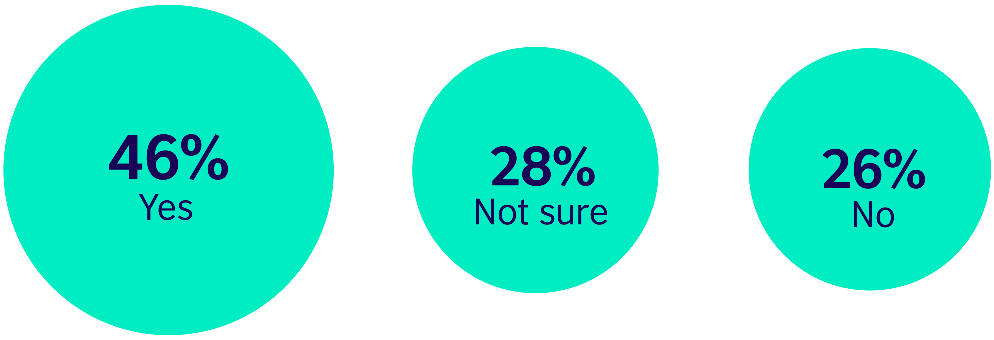


Figure 19. The curricula in schools and universities cater to the needs and trends of the cultural and creative industries

Of the Creative Players, 53 per cent believe schools or colleges offer creative and cultural programmes and only two per cent are unsure about this.

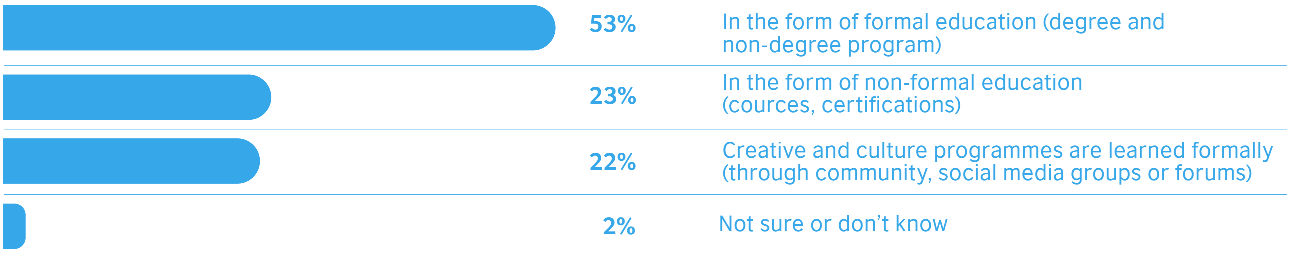
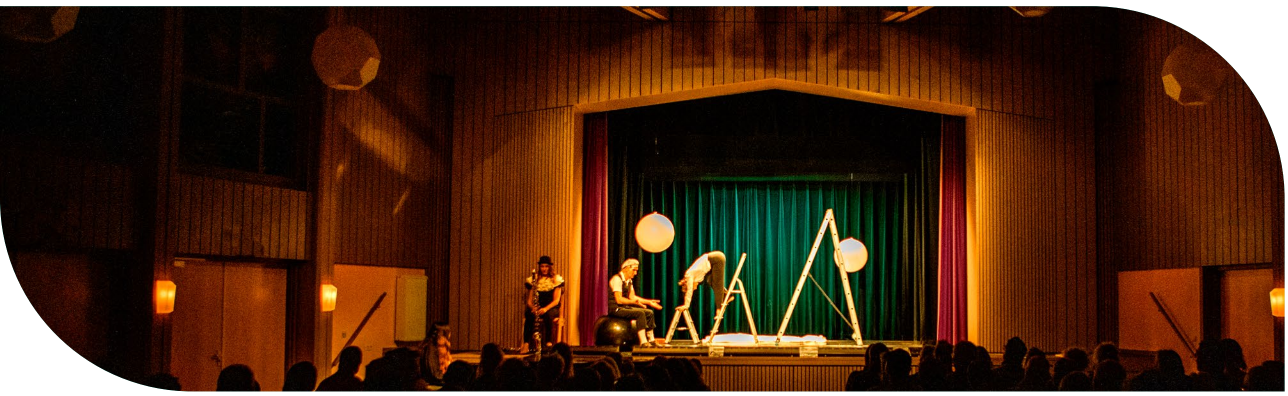


Figure 20. School or campus offering creative and culture programmes



43. Madsen, L. D. (2020). The ecosystem of research, education, and community. *Metallurgical and Materials Transactions A,* 51, 4329–4340.

Exosystem

Awareness is already growing among Creative Players about the importance of the IP process in protecting creative and cultural works. Furthermore, they recognise that it is very important to develop and promote IP among indigenous cultures/communities, particularly to safeguard traditional knowledge and traditional cultural expressions.

Table 9. The importance of IP

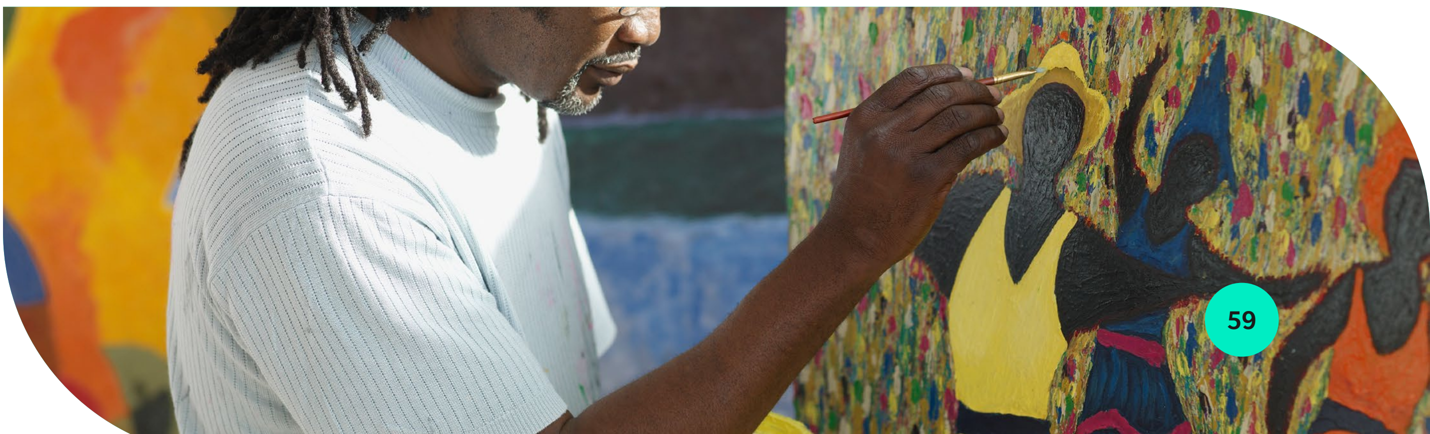
Likert		Value	Mean range
Very unimportant	Very not impactful	1	1.00–1.80
Not important	Not at all impactful	2	1.81–2.60
Neutral	Neutral	3	2.61–3.40
Important	Impactful	4	3.41–4.20
Very important	Very impactful	5	4.21–5.00

	Likert	Value	Mean range
How important is the IP process in protecting creative and cultural works (IP registration, IP valuation, IP commercialisation)?	Very important	5	4.21
How important is developing and promoting IP among indigenous cultures/communities, especially to safeguard traditional knowledge and traditional cultural expressions through IP?	Very important	5	4.33

Although IP is deemed very important by Creative Players, they have not yet been able to assess whether accessing and obtaining assistance for IP is difficult or easy.They only evaluate the overall support provided for this aspect of IP.

Table 10. Ease of obtaining support

Aspects	Mode
IP registration	Neutral
IP valuation	Neutral
IP commercialisation	Neutral
IP support services such as legal advice	Neutral



In determining the critical aspects that support the development of the creative economy, creative workers have yet to identify which elements are essential and which are not. Currently, all aspects are regarded as neutral.

Table 11. Critical aspects for supporting the development of the creative economy

Aspects	Mode	Percentage
Taxation	Neutral	7%
Business legal	Neutral	7%
Business registration/licence/permit	Neutral	9%
Custom registration	Neutral	7%
National and international trade	Neutral	6%
Monetary and non-monetary incentives	Neutral	5%
Contract law	Neutral	7%
Regulatory frameworks for media and broadcasting	Neutral	7%
Labour laws	Neutral	7%
Cultural heritage laws	Neutral	7%
Consumer protection laws	Neutral	7%
Digital rights management	Neutral	7%
Dispute resolution mechanisms	Neutral	6%
International treaties and agreements	Neutral	6%
Contribution to the United Nations Sustainable Development Goals	Neutral	5%

Technology is seen as playing a critical role in the value chain of the creative industry, especially in design, marketing and promotion. However, its application is perceived to be least impactful in the processes of prototyping and distribution.

Table 12. The use of technology in the value chain

Uses	Count	Rank
Design	1,577	1
Marketing and promotion	1,133	2
Production	1,123	3
Learning new things	895	4
Customer engagement	763	5
Payment/transactions	726	6
Branding	724	7
Prototyping	562	8
Distribution	515	9
Other (please specify)	3	10

In developing the creative industry, various ecosystems are considered important; however, compared with other ecosystems, high-speed internet access for digital creation is believed to be the most important.

Table 13. Importance of creative economy ecosystems

Ecosystem	Mode
Collaborative workspaces	Important
Theatre for performing arts and music	Important
Conference/convention centres and community halls	Important
Libraries	Important
Recreational parks, gardens and streetscapes	Important
Museums, galleries and exhibition spaces	Important
Studios for production	Important
Digital and physical marketplaces for presenting work/products (e.g. stores/galleries)	Important
High-speed internet areas for digital creation	Very important
Business incubators/accelerators	Important
Events (festivals, conventions, trade shows, music events, screen events, art exhibits, industry forums, corporate events, etc.)	Important
Makerspaces	Important

Of the information mediums used to foster the creative economy in ASEAN countries, the internet is reported to be the most used (52 per cent). In contrast, special interest groups are significantly less used (4 per cent). Although there are many webinars, conferences and seminars related to creative economy development aimed at Creative Players, only a small number of respondents (5 per cent) report using this medium to seek information related to the creative economy.

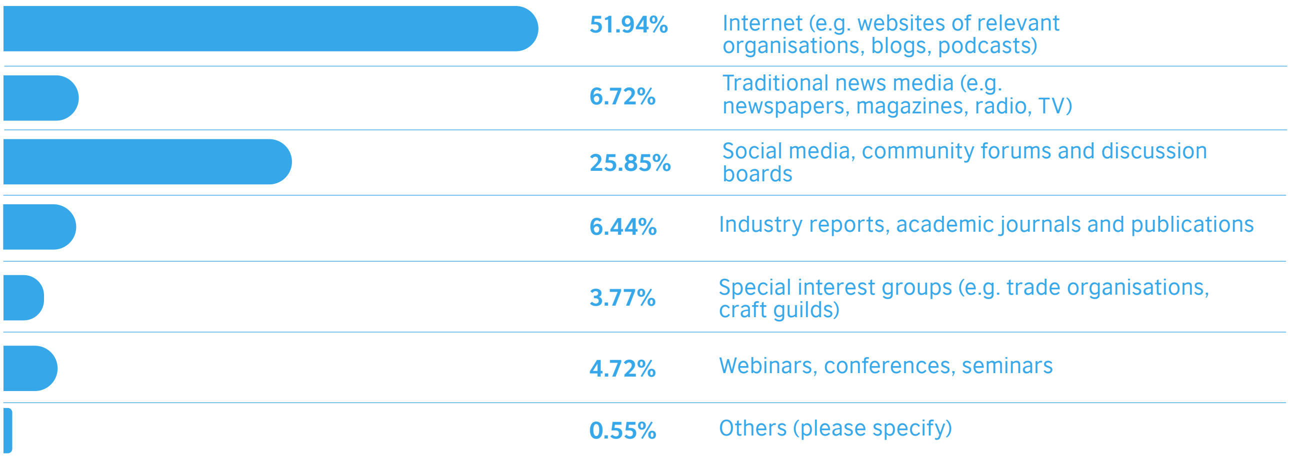


Figure 21. Information mediums used to seek information about the creative economy

Access to funding from grants (government, private and international) is viewed by Creative Players as the most critical source of financing, followed by financial institutions (such as banks and venture capital) and access to low-interest loans.

Table 14. Source of financing

RANK		1		2		3		TOTAL
	Average rank	Count	Percent	Count	Percent	Count	Percent	
Access to funding institution (bank, venture capital)	1.75	804	48.61%	452	27.33%	398	24.06%	1,654
Access to grant (government/private/ international grant)	1.69	885	46.02%	751	39.05%	287	14.92%	1,923
Access to non-collateral loan	2.21	259	22.31%	395	34.02%	507	43.67%	1,161
Access to low-interest loan	2.09	283	26.25%	419	38.87%	376	34.88%	1,078
Access to alternatives funding (peer-to-peer lending)	2.26	119	20.27%	194	33.05%	274	46.68%	587
Access to crowdfunding	2.32	170	19.47%	252	28.87%	451	51.66%	873
Access to philanthropic fund/ foundation	2.22	139	21.99%	216	34.18%	277	43.83%	632

Notes:
1 = Number and percentage of respondents who rank the variable as the most important
2 = Number and percentage of respondents who rank the variable as the second most important
3 = Number and percentage of respondents who rank the variable as the third most important

Macrosystem

Local wisdom and culture are perceived as having an impact on the development of creative and cultural products as well as services.

Table 15. The influences of local wisdom/culture

Likert		Value	Mean range
Very unimportant	Very not impactful	1	1.00–1.80
Not important	Not impactful	2	1.81–2.60
Neutral	Neutral	3	2.61–3.40
Important	Impactful	4	3.41–4.20
Very important	Very impactful	5	4.21–5.00

	Likert	Value	Mean range
The impact and influence of the local wisdom/ culture on the development of creative and cultural products and services	Impactful	4	3.94

Creative Players believe that public support is present in the following areas:

- attendance and participation in cultural activities
- social media promotions.

Perceptions of public support are neutral in other areas.

Table 16. Public support

To what extent is the public supportive of the creative economy?	Mode
Attendance at/participation in cultural activities	Quite a lot
Purchase or consumption of creative products	Neutral
Social media promotions	Quite a lot
Visiting local studios/arts hubs	Neutral
Learning creative and cultural knowledge	Neutral

Most Creative Players (68 per cent) report having difficulty accessing markets to promote their products.

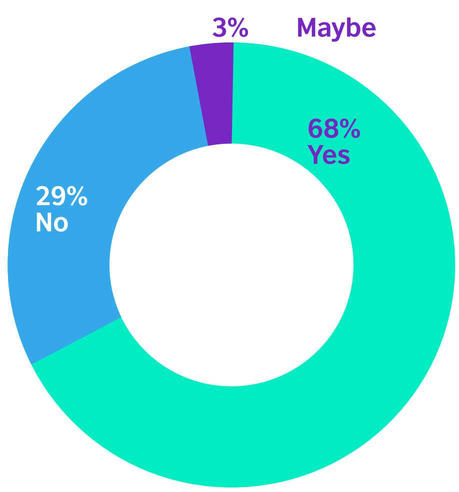


Figure 22. Difficulties in accessing the market

Two of the biggest challenges faced by Creative Players in accessing both domestic and international markets are:

- lack of financing to promote cultural and creative goods and services
- digital capabilities.

Table 17. Challenges in accessing market

Biggest challenge in accessing the domestic and international markets	Count	Rank
Lack of access to financing to promote cultural and creative goods and services	639	1
Lack of digital capabilities to connect with the marketplaces within your country of residence, within the region and globally	620	2
Lack of market information and know-how to tap overseas markets	562	3
Lack of scalability of business model to penetrate overseas markets	251	4
Lack of human resources and talent to bring cultural and creative goods and services to overseas markets	251	4
Lack of promotion and protection of IP	202	5
Others (please specify)	22	6

Creative Players consider the following to be **important aspects** that can support them in achieving success in the creative economy:

- access to market insight data for exports
- access to distribution networks or markets
- access to international distributors or agents
- access to quality partnerships with retailers (for physical or online shelf space).

Table 18. Critical aspects that may support success

Aspects	Mode
Access to market insight data for export	Important
Access to distribution networks or marketplaces	Important
Access to international distributors or agents	Important
Access to quality partnerships with retailers (for physical or online shelf space)	Important

Creative Players believe that individuals and communities benefit primarily from the creative economy (at the regional level) through:

- opportunities for creative collaborations with ASEAN counterparts
- access to creative and cultural products and services from other ASEAN countries.

Table 19. How do individuals and communities benefit from a vibrant and dynamic integrated ASEAN creative economy at the regional lavel?

Benefits	Count	Rank
Opportunity for creative collaborations with ASEAN counterparts	1,734	1
Access to creative and cultural products and services from other ASEAN countries	1,288	2
Opportunity to work in the creative economy of other ASEAN Member States	1,250	3
Purchase of creative and cultural products from other ASEAN countries at a lower price	960	4
Greater appreciation of the cultural and creative powers of other ASEAN Member States	945	5
Others (please specify)	2	6

The development of the creative economy in ASEAN is perceived as facing several major challenges at the regional level:

- lack of regional coordination and cooperation to promote the sector
- insufficient infrastructure and a non-conducive ecosystem to support creative initiatives
- limited access to financing for cultural and creative industries.

In contrast, the presence of appropriate IP safeguards is not viewed as a significant barrier to the advancement of the creative economy in the region.

Table 20. Major challenges perceived to be facing the ASEAN creative economy

Major challenges	Count	Rank
Lack of regional coordination and cooperation to promote the creative economy	1,263	1
Lack of infrastructure and a conducive ecosystem at the regional level to promote the creative economy	1,160	2
Lack of access to financing for the cultural and creative industries	1,068	3
Lack of capacity building and talent development for the cultural and creative industries	794	4
Lack of proper data, industry classifications and definitions of the creative economy	786	5
Lack of a conducive environment for transmission of knowledge and expertise within the cultural and creative industries	726	6
Competing priorities of respective ASEAN Member States in developing the creative economy	642	7
Lack of proper IP safeguards in place	461	8
Others (please specify)	3	9

According to the Creative Players, ASEAN should prioritise the following five activities, which are seen as particularly critical to creating an attractive destination for the creative economy at the regional level:

1. improving regional coordination and cooperation to promote the creative economy
2. building awareness to promote the ASEAN creative economy
3. collecting data for analysis to inform policymaking
4. promoting regional market access
5. directing investments into the creative economy.

Table 21. ASEAN priorities to make ASEAN an attractive regional destination

RANK		1		2		3		4		5		Total
	Average rank	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent	
Greater regional coordination and cooperation to promote the creative economy	2.12	910	51%	304	17%	234	13%	172	10%	181	10%	1,801
Awareness-building in promoting the ASEAN creative economy	2.54	375	23%	590	36%	287	17%	194	12%	196	12%	1,642
Collecting data for analysis to inform policymaking	2.95	187	13%	296	21%	500	36%	218	16%	192	14%	1,393
Harmonising job and industry classifications across the region	3.19	138	10%	289	22%	283	21%	443	33%	188	14%	1,341
Promoting cultural and creative enterprise development	3.19	256	16%	301	19%	350	22%	271	17%	425	27%	1,603
Promoting regional market access	3.06	173	17%	193	19%	239	23%	255	25%	171	17%	1,031
Directing investments into the creative economy	3.07	218	18%	216	18%	268	22%	310	25%	217	18%	1,229

RANK		1		2		3		4		5		Total
	Average rank	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent	
Providing skills training for cultural and creative workers	3.21	227	17%	236	18%	239	18%	304	23%	331	25%	1,337
Enhancing social security for the informal sector workers	3.23	102	12%	128	14%	127	18%	128	18%	178	27%	653
Fostering digital adoption for cultural and creative industries	3.52	84	12%	101	14%	122	18%	151	22%	239	34%	697
Working towards net zero transition for cultural and creative industries	3.57	54	13%	57	14%	58	14%	81	20%	158	39%	408
Others	3.29	6	18%	3	9%	10	29%	5	15%	10	29%	34

Notes:

1 = Number and percentage of respondents who rank the variable as the most important
2 = Number and percentage of respondents who rank the variable as the second most important
3 = Number and percentage of respondents who rank the variable as the third most important
4 = Number and percentage of respondents who rank the variable as the fourth most important
5 = Number and percentage of respondents who rank the variable as the fifth most important

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