



## Inclusivity In Music Concerts: Case Study Of Coldplay Music Concerts In Jakarta And Singapore

Aymi Litani\*<sup>1</sup>, Myrza Rahmanita<sup>2</sup>, Hera Oktadiana<sup>3</sup>, Sri Sulartiningrum<sup>4</sup>

<sup>1,2,3,4</sup> Trisakti Tourism Institute

Corresponding Author Email: [litainforbusiness@gmail.com](mailto:litainforbusiness@gmail.com)

### Abstract.

**Background.** Inclusive tourism emphasizes equal access for all individuals, including people with disabilities, to participate in tourism activities, including international music concerts fully.

**Aims.** This study aims to analyze the role of promoters in implementing inclusivity in organizing Coldplay concerts in Jakarta and Singapore.

**Methods.** The study was conducted at Gelora Bung Karno Stadium and the National Stadium between November 2023 and January 2024, using a qualitative approach through observation and interviews. It was analyzed using the SWOT method to identify strengths, weaknesses, opportunities, and threats. The results show that PK Entertainment in Jakarta and Live Nation Singapore both play strategic roles in translating Coldplay's commitment to inclusivity into the concert experience.

**Conclusion.** Jakarta has the strength of a large fan base and promoter credibility. Still, it faces infrastructure limitations and low awareness of inclusivity, while Singapore excels in infrastructure readiness and inclusive service standards despite facing high operational costs and public expectations.

**Implementation.** These findings emphasize the importance of collaboration between promoters, venue managers, the government, and inclusive communities to realize music concerts as a form of sustainable inclusive tourism.

**Keywords:** Inclusive tourism, music concerts, role of promoters, Coldplay, SWOT analysis



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## INTRODUCTION

Everyone, including people with disabilities, has the right to feel comfortable while traveling. However, many tourist attractions still lack adequate facilities for visitors with disabilities. Research by Wall-Reinius et al. (2023) shows that tourism companies are interested in increasing participation by individuals with disabilities in nature tourism and in providing them with opportunities to enjoy the experience fully.

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DOI 10.62885/toursci.v3i2.1064

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Many countries claim inclusivity as a commitment to diversity, but its implementation often fails to address the root structural issues (Steinmetz, 2021). Inclusivity also often emphasizes visual aspects such as gender, skin color, and religion, while deeper cultural, social, and economic factors are often overlooked (Arianto & Apsari, 2023). Nevertheless, tourism inclusivity is crucial for creating opportunities for all people, regardless of differences.

The concept of inclusive tourism emphasizes equal access for everyone, including people with disabilities, to participate in tourism activities fully (Murti et al., 2024). Therefore, tourism needs to consider the needs of people with disabilities in the design and development of tourism facilities (Widiastuti & Haryani, 2024).

According to Rochman et al. (2023), inclusive tourism focuses on meeting the needs of tourists with disabilities by ensuring the fundamental aspects of tourism, including availability, ease of access, and attractiveness. The topic of tourism inclusivity has also become a significant concern at both the global and national levels. Globally and nationally, the United Nations (UN), through *the Sustainable Development Goals (SDGs)*, emphasizes the importance of safe, inclusive, and sustainable cities and organizations, with inclusive tourism as a key component (Al-Okaily, 2021). The Indonesian government also supports this program through Law Number 8 of 2016 concerning Persons with Disabilities, which requires performance organizers to adhere to the principles of accessibility and appropriate accommodation for persons with disabilities (Murti et al., 2024). According to Rochman et al. (2023), four indicators demonstrate a friendly tourist destination that increases tourism inclusivity: attractions, accessibility, amenities, and ancillary services.

These four concepts encompass identifying the availability, quality, and need for inclusive facilities and services, such as parking areas, doors, stairs, elevators, guideways, and exceptional facilities, such as toilets with dedicated sinks, emergency voice buttons, and handrails. These services include the provision of information, tour guides, and facilities for the hearing-impaired, such as audio signs, teletext, television, and braille on signs (Rochman et al., 2023).

Sudarwan et al. (2021) stated that one of the successes that can be achieved if the role of the promoter is in accordance with the needs of inclusive tourists. Therefore, this study discusses the implementation of inclusivity in Coldplay Concerts held in Indonesia and Singapore through the role of promoters in creating inclusive concerts.

## LITERATURE REVIEW

### Concert Performance

A music concert is an event held by musicians for fans as a form of appreciation for their work (Adrian & Falah, 2023). Hidayatullah (2021) stated that music concerts are not only entertainment but also a means of communication between musicians and music lovers. Music conveys messages and feelings to listeners through various senses (Rahmavani, 2021). Haverkamp (2013) added that in addition to sight, smell, touch, taste, and hearing, there are also *vestibular senses* (balance and body movement), *tactile* (touch), *thermoreceptive* (sensing temperature), *proprioceptive* (stability of posture and body position), *interoceptive* (body condition and organ activity), and *nociceptive* (pain).

Music concerts require thorough preparation, structured management, and on-time execution (Fauziah & Setiawan, 2023). Numerous parties are involved, such as promoters and ticket buyers. The relationship between promoters and ticket buyers begins at the point of transaction and continues due to mutual desire and a high degree of interdependence (Saputra & Pasaribu, 2024).

Music festivals in Indonesia are now receiving increased attention, as evidenced by the increasing number of international-standard festivals held annually (Sukarni et al., 2021). The high public interest in attending music concerts has a positive impact on tourism development. Tourists attending concerts spend money on transportation, accommodation, food, and shopping (Fauzy & Maranisya, 2024). This boosts tourism, contributing to state revenue and economic growth.

Music concerts can also serve as a means of cultural promotion and of strengthening national identity. With proper promotion and organization, music concerts can serve as a diplomatic channel to strengthen Indonesia's image as a safe, attractive, and culturally rich tourist destination (Wigati et al., 2023).

### Inclusive Tourism

According to Strelnikova et al. (2023), inclusive tourism means active involvement in the production and enjoyment of tourism products, not only for people with disabilities but also for marginalized groups. Baramuli et al. (2021) describe inclusive tourism as an evolving paradigm

that provides equal opportunities for everyone to enjoy tourism activities. Inclusive tourism has also been widely evaluated for fostering mutual understanding and cooperation (Wang et al., 2023)

### **Inclusive Event Management**

Inclusive event management is an approach that ensures events create a welcoming atmosphere for all audiences and raise social awareness about the importance of sustainability (Khadijah & Pratiwi, 2023). Inclusive event management planning consists of three stages: preparation (pre-event), implementation (during the event), and post-event (Dewi & Syafganti, 2022).

1. **Pre-Event:** Choose a location that is accessible and disability-friendly, and provide information about accessibility facilities, special support, and directions for those who need them. This information should be available in a variety of formats, such as large text, Braille, or sign language if needed. Staff training is also essential so they can interact with diverse groups.  
**Event:** Provide supervision and support to all groups. Ensure staff and volunteers can interact with visitors in a friendly manner and respect the needs of people from all backgrounds. Provide equipment and dedicated areas for inclusive needs, as well as sign language translation or interpretation for deaf visitors.
2. **During the Event:** This can be done by providing supervision and support to all groups. Ensuring that all staff and volunteers can interact with all visitors in a friendly manner and respect the needs of all visitors from various backgrounds. Providing equipment and special areas that can meet the needs of inclusive groups, as well as providing sign language translation or interpretation for deaf event visitors.
3. **Post-Event:** Conduct a thorough evaluation to assess the extent to which the needs of inclusive groups have been met by gathering feedback from attendees. Update policies based on this evaluation to make future events more inclusive. Engage the inclusive community to hear their needs and receive suggestions for future event improvements.

**METHODS**

Research was conducted at two different locations: Gelora Bung Karno Stadium (GBK) in Jakarta and the National Stadium in Singapore. Both stadiums hosted Coldplay concerts. The research was conducted from November 2023 to January 2024.

This study employed a non-probability sampling method with a qualitative approach, which is used to explore and understand the meanings and experiences of research subjects in their social environment. This approach considers reality as a subjective social construct (Subhaktiyasa, 2024). This study employed a combination of observation and interview methods. Observations were conducted directly in the field, while interviews were conducted to obtain information from informants or sources (Romdona et al., 2025).

Data analysis or processing is an effort to systematically organize notes from observations and in-depth interviews to improve the research understanding of the findings of the problems studied (Sjafirah, 2016). To answer the research question regarding the role of promoters in promoting inclusivity in the tourism sector, specifically for Coldplay concert performances in Jakarta and Singapore, the researchers used a SWOT analysis. SWOT analysis is a strategic planning method used to evaluate the strengths, weaknesses, opportunities, and threats in an organization, project, or business that impact the achievement of company goals in the future (Safri et al., 2024).

**DISCUSSION**

**The Role of Concert Promoters in Creating Inclusive Concerts**

To analyze the role of promoters regarding inclusivity at Coldplay concerts in Jakarta, the researcher conducted a SWOT analysis, which can be seen in the following table (Table 1):

**Table 1: SWOT Analysis of the Inclusivity of the Coldplay Jakarta Concert**

	<p><b>(STRENGTH)</b></p> <ol style="list-style-type: none"> <li>PK Entertainment, as the Promoter, has credibility and experience in organizing international-class concerts.</li> </ol>	<p><b>(WEAKNESS)</b></p> <ol style="list-style-type: none"> <li>The majority of promoters are family businesses so the decision depends on the owner.</li> <li>Lack of transparency of information through the official website</li> </ol>
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	<ol style="list-style-type: none"> <li>2. Concerts increase economic turnover in the tourism sector</li> <li>3. A network of cooperation with global parties has been established</li> <li>4. The official ticket system reduces fraud</li> </ol>	<ol style="list-style-type: none"> <li>3. More casual employees than permanent employees</li> <li>4. There is no special division for the prebooking system for inclusive facilities.</li> </ol>
<p><b>(OPPORTUNITIES)</b></p> <ol style="list-style-type: none"> <li>1. This concert opens up the opportunity for Jakarta to become a premier destination for inclusive international concerts, but only if the infrastructure is improved.</li> <li>2. Opportunity to set new standards in organizing inclusive concerts in Indonesia, but it requires greater willingness from promoters.</li> <li>3. Bring long-term economic impact</li> <li>4. Utilizing digital technology can enhance the visitor experience, but it must be more than just a marketing gimmick.</li> </ol>	<p><b>STRENGTHS – OPPORTUNITIES (SO)</b></p> <ol style="list-style-type: none"> <li>1. Enhance PK Entertainment's role in setting international concert standards in Jakarta by leveraging its global network and previous experience.</li> <li>2. Using branding and the positive economic impact of Coldplay concerts to attract more international artists to Jakarta.</li> <li>3. Collaborate with inclusive communities to create more welcoming concerts for all attendees.</li> <li>4. Optimizing digital technology in organizing concerts to improve visitor experience and information transparency.</li> </ol>	<p><b>WEAKNESS – OPPORTUNITIES (WO)</b></p> <ol style="list-style-type: none"> <li>1. Collaborate with the government and stakeholders to improve concert venue infrastructure to be more visitor-friendly and meet international standards.</li> <li>2. Increase transparency of information through the official website so that visitors can more easily get details about facilities, accessibility, and a better concert experience.</li> <li>3. Utilize the momentum from the Coldplay concert to build a more professional concert management system, including crowd management and public transportation access.</li> <li>4. Develop a pre-booking system for inclusive facilities so that services such as wheelchairs, sensory kits, and sign language areas can be more easily accessed without having to seek manual assistance on site.</li> </ol>
<p><b>(THREAT)</b></p> <ol style="list-style-type: none"> <li>1. Resistance from stakeholders. Promoters, sponsors, and venue managers are still reluctant to invest in inclusive concerts because they are complicated, expensive, and unprofitable due to the lack of identified inclusive audiences.</li> <li>2. Congestion and inadequate transportation access make inclusive people reluctant to travel because they feel uncomfortable and unsafe.</li> <li>3. Challenges in managing security, safety, and rapid</li> </ol>	<p><b>STRENGTH – THREAT (ST)</b></p> <ol style="list-style-type: none"> <li>1. Using PK Entertainment's experience in international concerts to stay competitive with other cities such as Singapore and Bangkok.</li> <li>2. Offer better exclusive services in organizing future concerts so that Jakarta can compete as the main choice for international artists.</li> <li>3. Develop a stricter ticketing mechanism to reduce ticket scalping and increase ticket access for genuine fans.</li> </ol>	<p><b>WEAKNESS – THREAT (WT)</b></p> <ol style="list-style-type: none"> <li>1. Develop a long-term master plan to improve the quality of concert venues in Jakarta so that they are on par with those in other countries in providing world-class entertainment facilities.</li> <li>2. Reduce dependence on inadequate venues by seeking alternative, better concert locations or investing in the development of more modern stadiums.</li> <li>3. Improve training for staff and security officers to handle crowd management and inclusive visitor needs more professionally.</li> </ol>

<p>medical treatment in large-scale concerts.</p> <p>4. Legal risks if accessibility standards are not met.</p>	<p>4. Improve security and emergency evacuation systems at concert venues to meet visitor expectations and ensure safety at large-scale events.</p>	<p>4. Benchmarking with other inclusive concerts around the world to adopt best practices in facility management and visitor experience.</p>
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Source: Researcher's Process, 2024

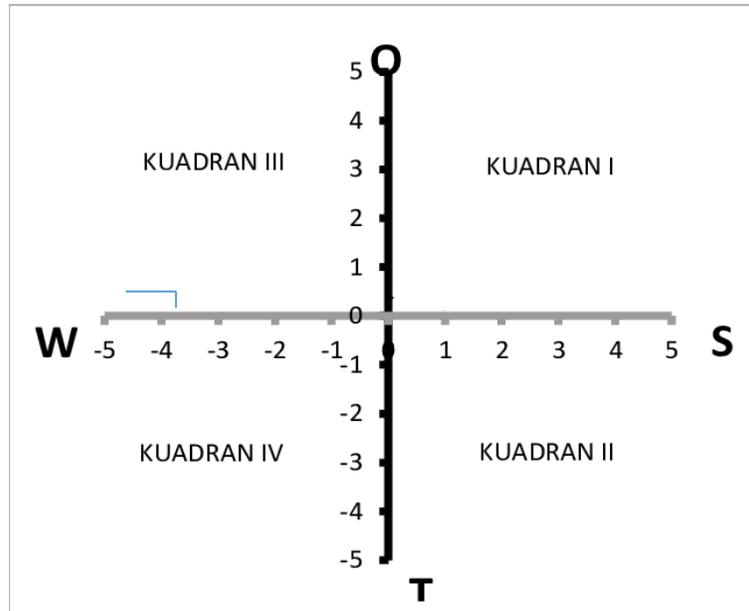
**Ifas and Efas Matrix (Provision of Physical Facilities at the Coldplay Concert in Jakarta)**

**Table 2. IFAS and EFAS Matrix of Inclusivity of Coldplay Concert Jakarta**

Strategic Factors	Weight	Rating	Score
<b>Strength</b>			
PK Entertainment has credibility and experience in organizing international concerts, but is not yet optimal in global scale planning.	0.15	4	0.60
Coldplay is one of the most popular international bands and has a huge fan base in Indonesia.	0.15	4	0.60
Production management and stage design with spectacular technology.	0.15	3	0.45
PK Entertainment has the strength to collaborate across sectors, including government, sponsors, security, ticket service providers, MSMEs, etc.	0.15	3	0.45
<b>Sub-Total</b>	<b>0.60</b>		<b>2.10</b>
<b>Weakness</b>			
No sign language area and helpdesk	0.10	4	0.40
The provision of ramps and lifts is still limited / venue infrastructure limitations.	0.10	3	0.30
Lack of understanding and trained human resources.	0.10	3	0.30
Long waiting times for inclusive visitors due to assistance by medical personnel can impact the overall experience.	0.10	2	0.30
<b>Sub-Total</b>	<b>0.40</b>		<b>1.30</b>
<b>TOTAL</b>	<b>1.00</b>		<b>3.40</b>
		<b>I FAS</b>	<b>0.80</b>
Strategic Factors	Weight	Rating	Score
<b>Opportunities</b>			
This concert opens up the opportunity for Jakarta to become a major international concert destination, but only if its infrastructure is improved.	0.15	4	0.60

<b>Strategic Factors</b>	<b>Weight</b>	<b>Rating</b>	<b>Score</b>
There is an opportunity to set new standards for inclusive concerts in Indonesia, but it requires greater commitment from promoters.	0.10	4	0.40
Bringing long-term economic impact	0.10	3	0.30
Leveraging digital technology can enhance the visitor experience, but it must be more than just a marketing gimmick.	0.15	4	0.60
<b>Sub-Total</b>	<b>0.50</b>		<b>1.90</b>
<b>Threat</b>			
Resistance from stakeholders. Promoters, sponsors, and venue managers are still reluctant to invest in inclusive concerts because they are complicated, expensive, and unprofitable due to the lack of identified inclusive audiences.	0.15	4	0.60
Traffic jams and inadequate transportation access make inclusive people reluctant to travel because they feel uncomfortable and unsafe.	0.10	3	0.30
Challenges in managing security, safety, and rapid medical response in large-scale concerts.	0.10	3	0.30
Legal risks if not meeting accessibility standards.	0.15	3	0.45
<b>Sub-Total</b>	<b>0.50</b>		<b>1.75</b>
<b>TOTAL</b>	<b>1.00</b>		<b>3.65</b>
		<b>EFAS</b>	<b>0.15</b>

Source: Researcher's Process, 2024



**Figure 1. IFAS and EFAS Quadrants of Inclusivity of the Coldplay Concert in Jakarta**

Source: Researcher's Process, 2024

Based on the results above, the strategy that must be taken to overcome the role of the promoter in organizing the Coldplay concert in Jakarta is SO (Strengths-Opportunities) and where to do it:

1. Enhancing PK Entertainment's role in setting international concert standards in Jakarta by leveraging its global network and previous experience.
2. Using branding and the positive economic impact of Coldplay concerts to attract more international artists to Jakarta.
3. Collaborating with inclusive communities to create more welcoming concerts for all attendees.
4. Optimizing digital technology in organizing concerts to improve visitor experience and information transparency.

"It takes a lot of case studies to implement inclusive concerts. So far, the most frequently encountered case studies are for people with disabilities and pregnant women. For other disabilities, it is more difficult because it has to be done on a case-by-case basis, and investigations and consultations with medical and security personnel are always necessary. Being inclusive is

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DOI 10.62885/toursci.v3i2.1064

one thing, but ensuring inclusivity is at its most secure is the most important for us." (Respondent 5)."

Researchers also conducted a SWOT analysis of the role of promoters in visitors' perceptions of the Coldplay concert in Singapore, as shown in Table 3.

**Table 3. SWOT Analysis of Coldplay's Concert Inclusivity in Singapore**

	<p><b>(STRENGTH)</b></p> <ol style="list-style-type: none"> <li>1. The venue infrastructure is modern and friendly for all groups.</li> <li>2. High standards of inclusive service with facilities such as <i>sensory kits</i>, <i>sensory rooms</i>, <i>subpacks</i>, and <i>sign language areas</i>.</li> <li>3. Structured and transparent delivery of information through the official website.</li> <li>4. Collaboration with international and local communities to improve concert services.</li> <li>5. Better crowd management capabilities, with organized queuing systems and public transportation.</li> </ol>	<p><b>(WEAKNESS)</b></p> <ol style="list-style-type: none"> <li>1. The high cost of running a concert with inclusive standards.</li> <li>2. Reliance on technological devices for inclusive facilities requires education for visitors.</li> <li>3. Management of sensory facilities and inclusive services still requires greater efficiency.</li> <li>4. The complexity of identifying the needs of inclusive visitors at concert venues.</li> </ol>
<p><b>(OPPORTUNITIES)</b></p> <ol style="list-style-type: none"> <li>1. Enhance Singapore's image as an inclusive international concert destination.</li> <li>2. Leverage collaboration with the global community for inclusive service innovation.</li> <li>3. Increased technological innovation in concerts, such as the use of Augmented Reality (AR) and navigation applications.</li> </ol>	<p><b>STRENGTHS – OPPORTUNITIES (SO)</b></p> <ol style="list-style-type: none"> <li>1. Optimize the National Stadium's infrastructure and inclusive service system to attract more global artists.</li> <li>2. Enhance technology-based service innovation, such as AR and navigation apps, for a better concert experience.</li> <li>3. Collaborate more closely with international</li> </ol>	<p><b>WEAKNESS – OPPORTUNITIES (WO)</b></p> <ol style="list-style-type: none"> <li>1. Increase efficiency in the management of sensory facilities and inclusive services to reduce queues.</li> <li>2. Develop educational programs for visitors regarding the use of inclusive technology such as subpacks and sensory kits.</li> <li>3. Seek solutions to reduce the operational costs of inclusive fa-</li> </ol>

<p>4. Make large-scale concerts an annual event that attracts tourists.</p>	<p>and local communities to develop more inclusive concert facilities. 4. Make high-standard concerts an annual tourist attraction for economic growth.</p>	<p>cilities through sponsorship partnerships or support from global institutions. 4. Improve the initial identification system for inclusive visitors so that their needs can be better prepared before the concert.</p>
<p><b>(THREAT)</b> 1. Competition with other countries. Organizing international concerts. 2. Visitors' expectations are increasingly high regarding the quality of concert services in the future. 3. Technical risks on devices such as subpacks or sign language interpreter screens. 4. Challenges in managing venue capacity to ensure it remains comfortable and safe for visitors.</p>	<p><b>STRENGTH – THREAT (ST)</b> 1. Innovate in organizing concerts with exclusive technology-based services to remain superior to other countries. 2. Establish a system of periodic evaluation and service improvement to meet high visitor expectations. 3. Improve the reliability of technology in concerts, such as ensuring subpacks and sign language interpreter screens are free from technical glitches. 4. Optimize venue capacity management strategies to ensure visitor comfort and safety.</p>	<p><b>WEAKNESS – THREAT (WT)</b> 1. Reduce reliance on technology by providing manual alternatives for inclusive services. 2. Increase efficiency in venue management and public transportation to reduce congestion after concerts. 3. Increase transparency in communication with visitors through the website and other information channels. 4. Conduct benchmarking with inclusive concerts in other countries to improve the quality of concert events continuously.</p>

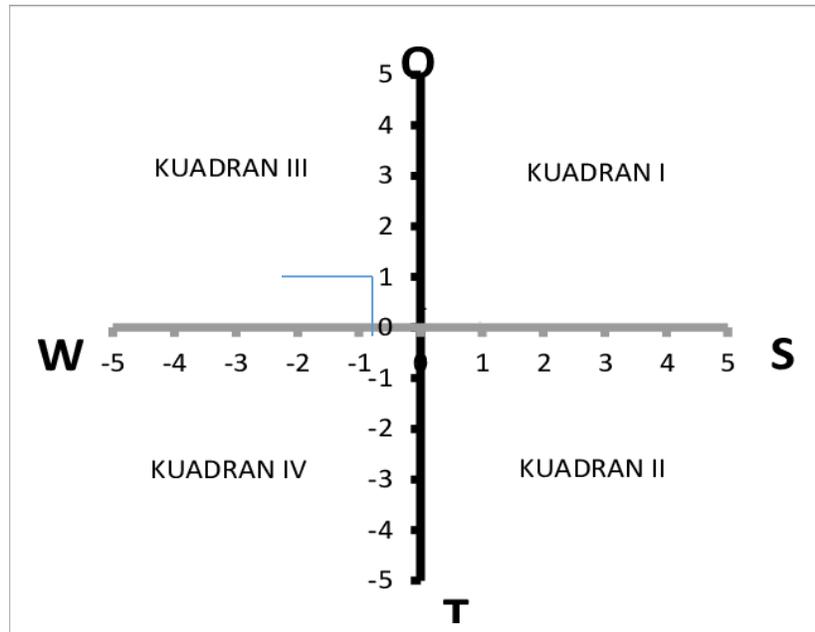
Source: Researcher's Process, 2024

**Table 4. IFAS and EFAS Matrix of the Promoter's Role in Organizing the Coldplay Singapore Concert**

Strategic Factors	Weight	Rating	Score
<b>Strength</b>			
The venue infrastructure is modern and friendly for all groups.	0.15	4	0.60
High standards of inclusive service with facilities such as sensory kits, sensory rooms, subpacks, and sign language areas.	0.15	4	0.60
Structured and transparent delivery of information through the official website.	0.15	3	0.45
Collaboration with international and local communities to improve concert services	0.10	3	0.30
Better crowd management capabilities, with organized queuing systems and public transportation.	0.10	4	0.40
<b>Sub-Total</b>	<b>0.65</b>		<b>2.35</b>
<b>Weakness</b>			
The high cost of running a concert with inclusive standards.	0.10	4	0.40
Reliance on technological devices for inclusive facilities requires education for visitors.	0.10	3	0.30
Management of sensory facilities and inclusive services still requires greater efficiency.	0.05	3	0.15
The complexity of identifying the needs of inclusive visitors at concert venues.	0.10	2	0.20
<b>Sub-Total</b>	<b>0.35</b>		<b>1.05</b>
<b>TOTAL</b>	<b>1.00</b>		<b>3.40</b>
		<b>IFAS</b>	<b>1.30</b>

<b>Strategic Factors</b>	<b>Weight</b>	<b>Rating</b>	<b>Score</b>
<b>Opportunities</b>			
Enhancing Singapore's image as an inclusive international concert destination.	0.20	4	0.80
Leveraging collaboration with the global community for inclusive service innovation.	0.15	4	0.60
Increased technological innovation in concerts, such as the use of Augmented Reality (AR) and navigation applications	0.15	4	0.60
Making large-scale concerts an annual event that attracts tourists.	0.15	3	0.30
<b>Sub-Total</b>	<b>0.65</b>		<b>2.30</b>
<b>Threat</b>			
Competition with other countries. organizing international concerts.	0.10	4	0.40
Visitors' expectations for the quality of concert services in the future are increasing.	0.10	3	0.30
Technical risks on devices such as subpacks or sign language interpreter screens.	0.10	3	0.30
The challenge in managing venue capacity to keep it comfortable and safe for visitors.	0.05	3	0.15
<b>Sub-Total</b>	<b>0.35</b>		<b>1.15</b>
<b>TOTAL</b>	<b>1.00</b>		<b>3.45</b>
		<b>EFAS</b>	<b>1.15</b>

Source: Researcher's Process, 2024



**Figure 2. IFAS and EFAS Quadrants of Inclusivity of Coldplay Singapore Concert**

Source: Researcher's Process, 2024

Overall, Coldplay's concert in Singapore demonstrated a better implementation of inclusive tourism standards than Jakarta. This demonstrates the crucial integration of promoters, venue managers, and advocacy organizations like KultureCity in ensuring a truly inclusive concert experience. This comparison reinforces the urgency of Scheyvens & Biddulph's (2017) finding that tourism can only be considered inclusive if marginalized groups experience tangible benefits and can fully participate in the consumption of tourism products.

**CONCLUSION**

Based on the results and discussion that the researcher has described above, the researcher then draws three main conclusions:

PK Entertainment in Jakarta and Live Nation Singapore are two key players, both emphasizing inclusivity as a key principle in organizing Coldplay concerts. Both play a strategic role in translating Coldplay's commitment to accessibility and social awareness into a live performance experience accessible to all levels of society.

In the context of Jakarta, PK Entertainment plays a role as a promoter, relying on market power. Based on a SWOT analysis, Jakarta has significant advantages in the form of Coldplay's large fan base and the positive image PK Entertainment has built through hosting numerous large-scale concerts. However, this role faces significant internal challenges, particularly limited infrastructure and a unequal awareness of the importance of inclusivity in the concert industry. Nevertheless, Jakarta holds a strategic opportunity to position itself as an inclusive international concert host city. The main threat arises from resistance from some stakeholders who still view inclusive concerts as a complex and costly investment, requiring more intensive persuasion and collaboration.

Meanwhile, Singapore is playing the role of a mature supporting ecosystem. Through Live Nation Singapore, the country demonstrates significant strengths in the form of modern infrastructure and a relatively high level of inclusivity across nearly all aspects of public life. A SWOT analysis indicates that these conditions place Singapore in a superior position to host an inclusive Coldplay concert. However, this role is not without its drawbacks, namely the high cost of infrastructure management and the substantial budget required to host a fully inclusive music concert. In terms of opportunities, Singapore has ample room to further strengthen its position as a global destination for international artists. However, the high expectations of the public and concertgoers pose a threat, as they demand continuous improvements in service quality in line with rising standards of public satisfaction.

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