

# Future of Arts & Culture

Trajectories for the next decade

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A study undertaken by: **CHANGEIST**

# What is the Future of Arts & Culture Study?

We live in a time of increasingly rapid change where social unrest, global pandemics, and planetary climate emergency as well as inherited and evolving social/economic contexts pose challenges faced by the sector around the world.

While many organizations and actors throughout the arts and culture value chain are taking independent steps to assess their own strategies, little work has been done either across sectors – namely, museums and galleries, performing arts and music, or globally, to build a holistic picture of what is emerging for these sectors in the near future. Given the tightly interconnected nature of arts and culture, a holistic view is not just beneficial, but necessary.

**Future of Arts and Culture study aims to engage, sense make and illustrate the perspectives of wide range of leaders in the industry worldwide as a snapshot in time. Through a mix of online insight collection and synthesis, selected in-depth interviews, and expert analysis from leaders in qualitative trend analysis and scenario development for strategic planning with experience in arts and culture, the study aims to illuminate and highlight critical trends and the possible scenarios that they may connect to form a – not mutually exclusive, but potentially co-existent – coherent forward view about the future of the arts & culture sector.**



Image Credit: Lachlan Gowen

# What is the Futurescaper?

**Futurescaper is a tool that allows large groups to identify key drivers of change, and what these may mean for important issues.** It generates a systems map of causal relationships ordered by perceived importance and impact. The outcome is a set of qualitative mini-scenarios that describe the group's view of what the future may hold for a specific topic, and what the impacts of such a future may be.

Futurescaper was developed at MIT as part of research into collective dynamics of foresight. It has been deployed globally by governments, strategists, NGOs and foundations seeking to gain insight into possible futures, their drivers and impacts.

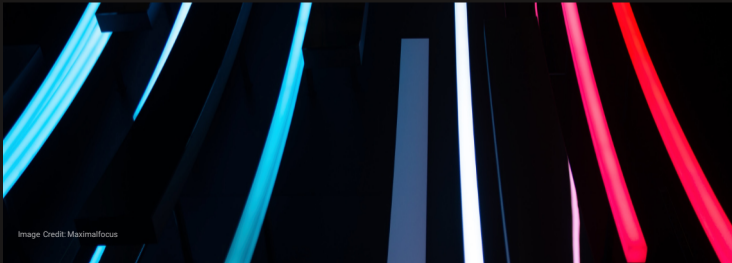


Image Credit: Maximalfocus

# Project Methodology

DRIVERS

RESPONSES

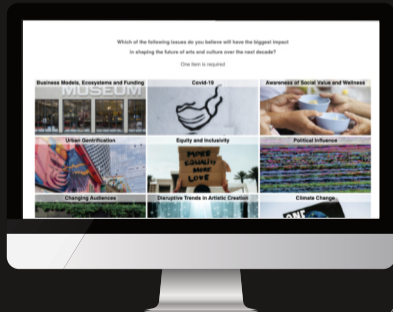
ANALYSIS

SCENARIOS

Respondents from different regions, sectors and roles were presented, through an online survey, nine high-level drivers of change happening in arts and culture globally. They were then asked to select one driver, extrapolate impacts of that driver through several steps, and describe future vignettes where several key impacts combine. Invitees were offered the opportunity to go through several rounds of the exercise to explore multiple possible futures.

Changeist analysed the causes and impacts mapped in the responses, their relationships and outcomes, and developed three inductive scenarios from these inputs. The scenario narratives represent the dominant views of the group as a whole.

The scenarios presented here are not meant to be forecasts as much as provocations that interweave the collective opinions and insights of the global participant group. They are possible futures as collectively voiced by contributors, and the narratives that follow connect the dots of data in narrative forms that can be more easily explored.



# Responses

DRIVERS

RESPONSES

ANALYSIS

SCENARIOS

**250** Invitations to participate were sent to leadership in museums and galleries, performing arts, music, funding organizations, curators and producers across six continents.

**204** Sessions were initiated, **52** of which resulted in "mini-scenarios". This means that respondents stepped through a sequence of drivers and impacts leading to a "solution".

**508** Factors (Drivers, Trends and Impacts) entered or used.



# Sensemaking

DRIVERS

RESPONSES

ANALYSIS

SCENARIOS

Futurescaper allowed us to listen for common issues, insights and suggested impacts across dozens of conversations among over 200 respondents—as if we were hearing many conversations in a single large workshop taking place across time and space.

The more a driver or impact was mentioned, and the more often it was mentioned in connection to related trends, the more prominent it became

in the “map” of the conversation. Looking at the clusters helped us identify the themes of greatest interest, and also see the chain of connected impacts that emerged from them.

These chains of impact can be read as a story of how a future might unfold from the group’s collective point of view. Three of the largest narrative chains became the basis for the scenarios we describe here.



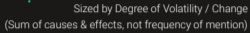
Image Credit: Antenna

## DRIVERS

## RESPONSES

## ANALYSIS

SCENARIOS



# Ranking of Root Issues

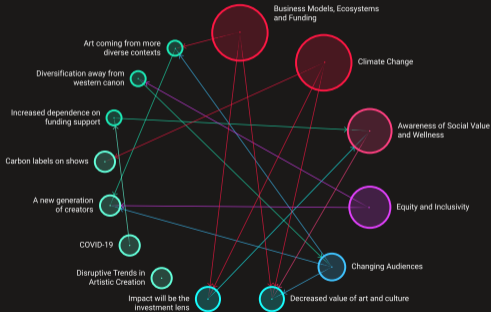
– by frequency of first selection

DRIVERS

RESPONSES

ANALYSIS

SCENARIOS

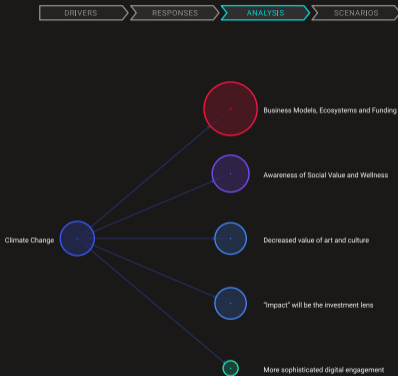


# Climate change as a universal driver

One driver of change explored in this project sits above all others, based on the views of contributors—climate change. Unique among the many factors explored, it is the one issue that will touch almost all aspects—social demands, economic capacity, technological innovation, political agendas and public values.

Economic and social dimensions of climate change are seen as driving more attention toward sustainable business models and new channels, and greater attention to societal awareness, costs, and impacts.

**IMPLICATION :** Arts and culture may take a back seat as a social and economic priority due to shifting political attention, social disruption and funding re-allocation.



DRIVERS RESPONSES ANALYSIS SCENARIOS

Shaped by Climate Change, but pushing sectors toward more clearly defined, starker choices of economic model.

Shaped by generational and values shifts.

New creators, audiences and tool reshaping the landscape.



# About the scenarios

DRIVERS

RESPONSES

ANALYSIS

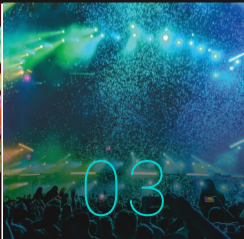
SCENARIOS

Scenarios as an exploratory form emerged from collaboration between science and art—specifically between strategic research, filmmaking and storytelling. These scenarios are true to that approach, expressing a collection of related data through familiar, human-scale stories.

Those presented here are not meant to be forecasts as much as provocations that interweave the collective opinions and insights of the

global participant group. They are possible futures as collectively voiced by contributors, and the narratives that follow connect the dots of data in narrative forms that can be more easily explored.

They are also not mutually exclusive futures; any given organisation, large or small, global or local, may be confronting aspects of each of these scenarios on different timescales.





SCENARIO 01:

# Spectaculars & Small Stages

## SCENARIO 01: Spectaculars & Small Stages

With growing uncertainty around the sources of financial support they've traditionally relied on, arts and culture organisations focus on business models and the need for stable funding.

In this future, making an impact means generating a positive bottom line first and foremost. Profitability is the key imperative, pushing arts and culture ever further toward the dynamics of media and entertainment.

This trend pushes arts and culture ever further toward the dynamics of media and entertainment, favouring big names and merchandisable experiences over emerging artists and new, less familiar works.



# SCENARIO 01:

## Spectaculars & Small Stages

### Impacts & Outcomes

#### CREATORS

Those with skills, access and support to play in big digital platforms have advantage over traditional artists and performers.

Those embracing new technologies gain an advantage.

#### COMMUNITIES

Small communities find supporting and retaining arts organisations challenging as audiences shrink and funding declines.

New artists struggle for education and exhibition opportunities outside of digital platforms and small-scale engagement.

#### AUDIENCES

More media-focused audiences are drawn to new works.

Older, more conservative or casual audiences fall away.

Audiences shift to digital, larger markets, but those without technology access are excluded.

Local audiences maintain touch with smaller organisations.

#### INSTITUTIONS

More commercially orientated organisations with known brands do well.

Those in middle markets, or who rely on public funding face challenges.

#### FUNDERS

Philanthropy is stretched by other social needs.

Commercial funding grows, as does some private, digital funding and support.

Eyeballs, footfall and revenue remain key metrics for impact.

SCENARIO 02:

# Global Network of Communities

Image Credit: Ramadan Azmi



## SCENARIO 02:

# Global Network of Communities

The stress of the pandemic has created a new focus on the need to strengthen communities, a critical piece of which is the strengthening of arts and culture at a local level as a critical source of connection and growth.

This re-dedication to social impact means a greater focus on the critical issues of the day in arts and culture: climate change, equity and equality, social and economic justice and more.

More direct ties to diverse communities also helps drive an expansion of themes and issues represented in new works by a new generation of artists and performers. Communities can see themselves reflected in more inclusive shows, further cementing the relationship between creators and a wide range of audiences.



# SCENARIO 02:

## Global Network of Communities

### Impacts & Outcomes

#### CREATORS

Artists, performers and curators find new engagement in art for social purpose, with increased training, collaboration and public engagement and support.

#### COMMUNITIES

With arts and culture re-centered in communities, many develop a cultural "life" they may have lacked previously. Some gain new experimental spaces for creativity, and benefit from exchange with others.

Definition of community expanded to focus more on interest than proximity.

#### AUDIENCES

Audiences interested in experiencing art and culture for learning as well as entertainment may find more to engage with, and become more active components of cultural experience.

#### INSTITUTIONS

Institutions with strong ties to their respective communities thrive, and gain from exchange and support by allied organizations in other communities and countries.

#### FUNDERS

Local and public funding take a stronger position in the funding mix.

Inclusion, outreach and meaningful connection to social enterprise become the key metrics for impact.



SCENARIO 03:

# Platforms and Multiverses

## SCENARIO 03: Platforms and Multiverses

Rising to the challenges of an uncertain world, a new generation of creators build on the foundations created in the early 2020s for a more transactional future where digital tools and platforms dominate attention and cultural commerce.

A far broader definition of what constitutes art emerges, unsettling traditionalists, but more formally recognizing a wider spectrum of works as valuable culture. This includes a broader definition of curation, reaching into new forms of digital artifacts, micro-heritage and rapid response collecting, expanded cultural R&D.

In the shift to digital space, "community" takes on less geographic connotations, cultural borders are less constraining, and social value of art emerges as much from its innovative capacity as from focus on specific issues or themes.



# SCENARIO 03:

## Platforms and Multiverses

### Impacts & Outcomes

#### CREATORS

The prospect of new audiences and channels draw a more diverse group of creators

Direct control of new works

The ability to monetize them, creates more predictability for emerging artists, providing more economic choices.

#### COMMUNITIES

Communities as physical entities become less important, and more global communities of interest are able to access platforms that speak directly to their tastes and economies.

#### AUDIENCES

Broader audiences who may have been less attracted to mainstream art and culture find more of interest in new works.

#### INSTITUTIONS

Power shifts to smaller networks

More forward thinking institutions that can imagine new ways of working, new distribution methods, and attract new audiences

#### FUNDERS

Funding shifts toward smaller, individual, digital forms of micropatronage.

Advent of crypto-based funding models and venture funding for culture lessens reliance on traditional sources of support.

# Strategic Questions

- How can technological and social innovation be balanced in ways that explore experiential richness with real-world relevance?
- How can new funding models and economics be explored in ways that enable arts and culture to break out of the private/public funding binary?
- How can existing networks and alliances across borders be strengthened, and what new ones can be created?
- How can digital arts and culture platforms be used for better reach and not exclusion behind markets and paywalls?
- What role can arts and culture play in forging new social contracts and supporting societal wellbeing?
- What can be done to strengthen mid-sized arts and culture platforms, beyond blockbusters and grass roots?
- How can digital innovation be shared with smaller arts organizations who may lack resources to compete with larger institutions?

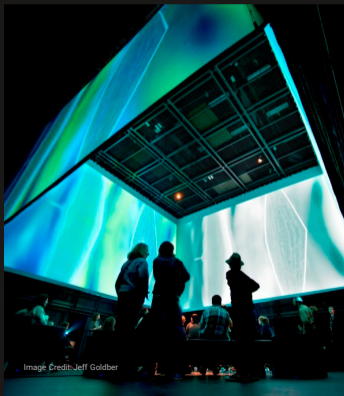


Image Credit: Jeff Goldber

# How do we get to the future?

## Voices of Respondents

“Advocate for spaces that have both drawcard art/culture and community art/culture. They need not be exclusive. Audiences may be drawn by what they know and then become more courageous and explore what they don't know.”

“We need a new value proposition for arts and culture. It's not about buying and selling and cash income. It's about the cultural richness of societies and peoples. It's about innovation across all sectors.”

“Focus on meaning, artistic integrity and values...how to use digital, AR, VR etc in combination with physical spaces so as not to lose the young audience and creators.”

“Develop legitimate impact assessment frameworks to account for the value of culture (not just instrumental value but more intrinsic value).”

“New funding mechanisms are necessary to support the cultural sector and to expand the creative sectors. An increasing private - public partnership model should be developed that goes beyond philanthropy.”

“Embrace diversity in every way possible, including and especially supporting people and institutions that we neither like nor understand.”

“Bring down borders between the various artistic disciplines.”

“Articulate value. Don't lose the argument by default by only making the well-being case, or only making the economic case. Art can and does do more than those.”

“Lead by actively transforming toward progressive ideals even if lays bare problematic historical foundations.”

# Next steps

This doesn't end here. We're hoping that this will be a catalyst for many discussions and we aim to reflect and incorporate that input into an evolving picture that is shared with the community.

Over the coming year, we propose:

- **To launch a publicly accessible portal for this work on the web**
- **Instigate and organise discussions at different scales with all of you and other sector leaders around the world**
- **Dive deeper into themes from sectoral and geographical perspective**
- **Enrich the evolving picture of the drivers**

To get involved or for more information, please email [contact@futureofartsandculture.org](mailto:contact@futureofartsandculture.org)

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