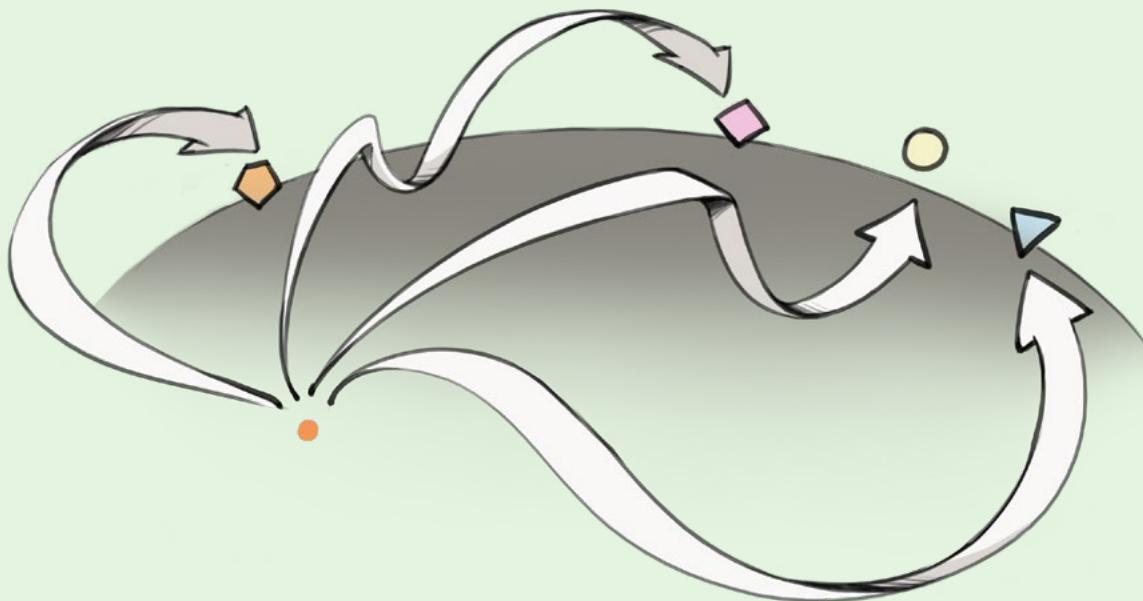


# A guide to the audience of the future

June 2023

DEN

# A guide to the audience of the future



## Probing the future

The success of an organisation depends in part on the extent to which they are alert to signs of change and attempt to visualise the future. Such organisations will have stronger propositions and a better revenue model than organisations that do not or hardly look ahead. This guide outlines four scenarios that can help your organisation think about the cultural landscape and audience in 2040, and how you can anticipate that future world today.

## What do we know about the future?

The cultural sector is facing major challenges with regard to keeping its venues up and running in the future. We are living in an era of rapid changes and in a society that is increasingly digital. More and more, culture is experienced online, while online and offline are becoming increasingly entangled. Digital data reveal who we are, what we like and what places we like to visit.

Institutions that understand this transformation will continue to be able to find and attract their audiences in the future. Those that continue to focus on today's issues only are too caught up in putting out fires to get their fire safety system in order.

### 3 A guide to the audience of the future

#### Why think about the future?

Tomorrow's world will not be the same as the world right now, although it will be rooted in today. Contemporary trends and developments determine the future. Probing the future helps organisations to understand the dynamics of change. This way, organisations can prepare for the future and respond with agility to change.

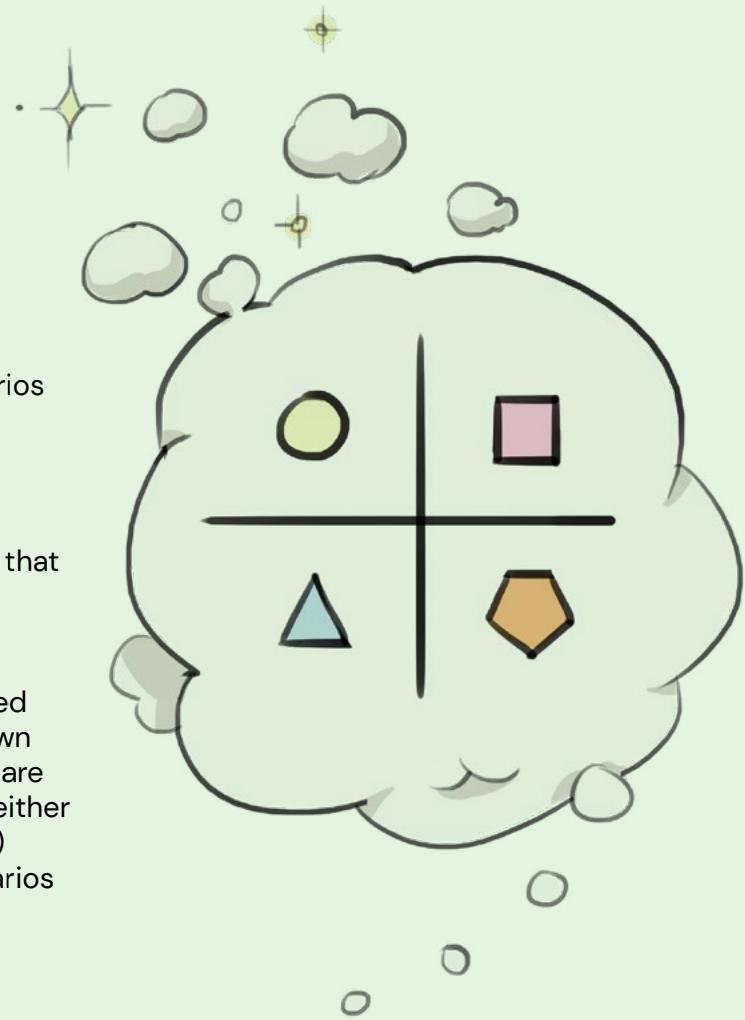
#### What are scenarios?

Scenarios are fictitious pictures of the future; so they are not accurate predictions. They are often painted in bolder lines with vivid colours to emphasise that the future will not be like today. Scenarios are a tool to help probe and discuss the future. They point to and provoke the main themes for debate, and thereby help steer the dialogue. Usually organisations work with multiple scenarios. They represent different possible futures in which the most important uncertainties have been elaborated. These uncertainties are the key variables in these future storylines.

#### The DEN scenarios

DEN has developed four scenarios regarding how Generation Z experiences culture in the year 2040.

The scenarios depict a society that is either cohesive – meaning that it's inclusive and everyone participates – or fragmented, meaning that people with shared interests mainly inhabit their own bubbles. In two scenarios they are actively involved in culture, as either a maker or a sharer of (cultural) content. In the other two scenarios they are passive consumers of cultural offerings.



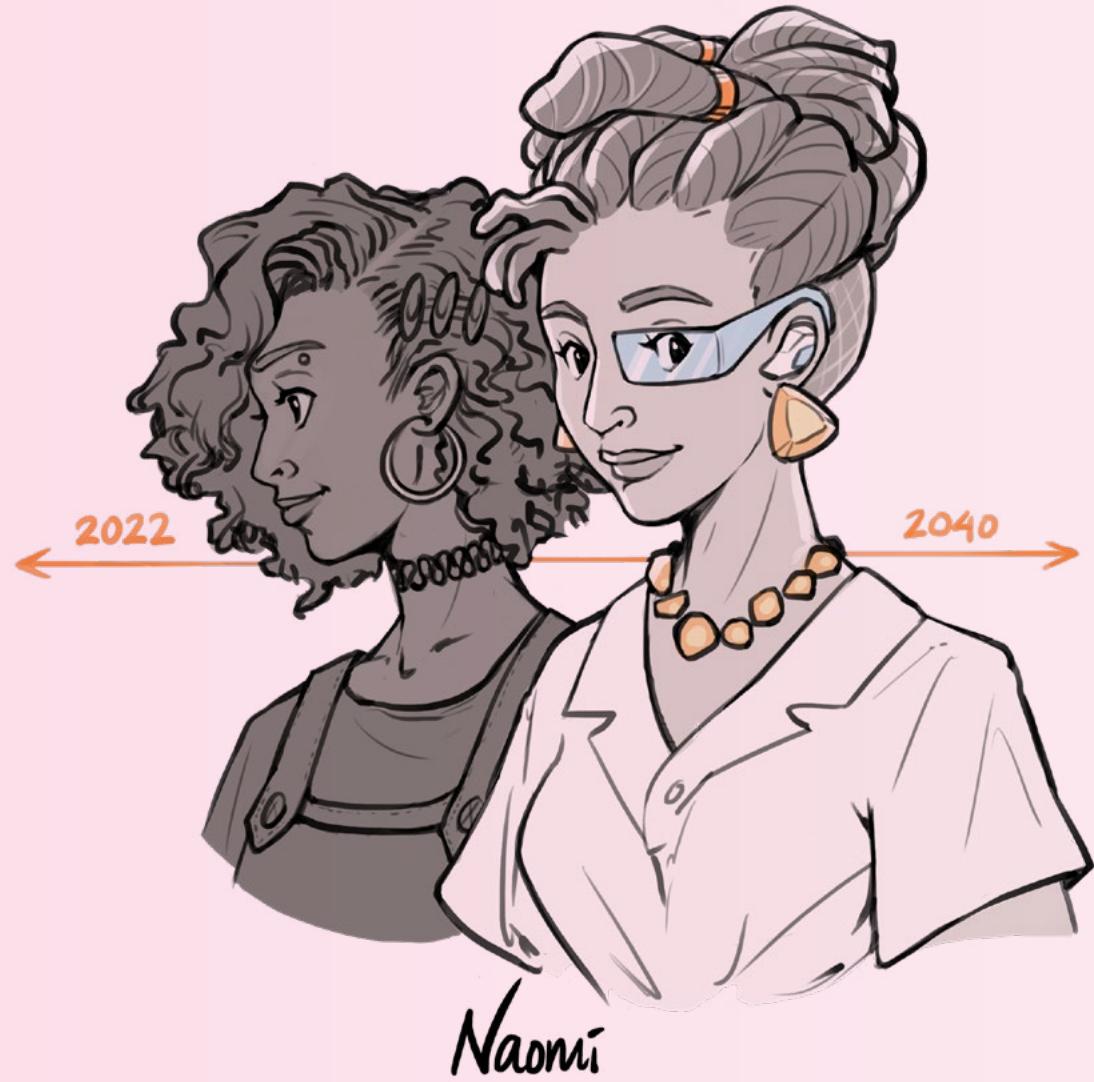
#### 4 A guide to the audience of the future

### Who is Gen Z? Meet Naomi

Meet Naomi! Aged 35, Naomi is the main character in the scenarios depicting the year 2040. She is part of 'Gen Z': the generation born between the late 1990s and 2010. This generation is also referred to as the Zoomer generation or the i-generation. Naomi grew up in a fully digitised world and is accustomed to swiftly acting on her own impulses. Her generation is large and diverse: in 2020, Gen Z represented 40% of all consumers.

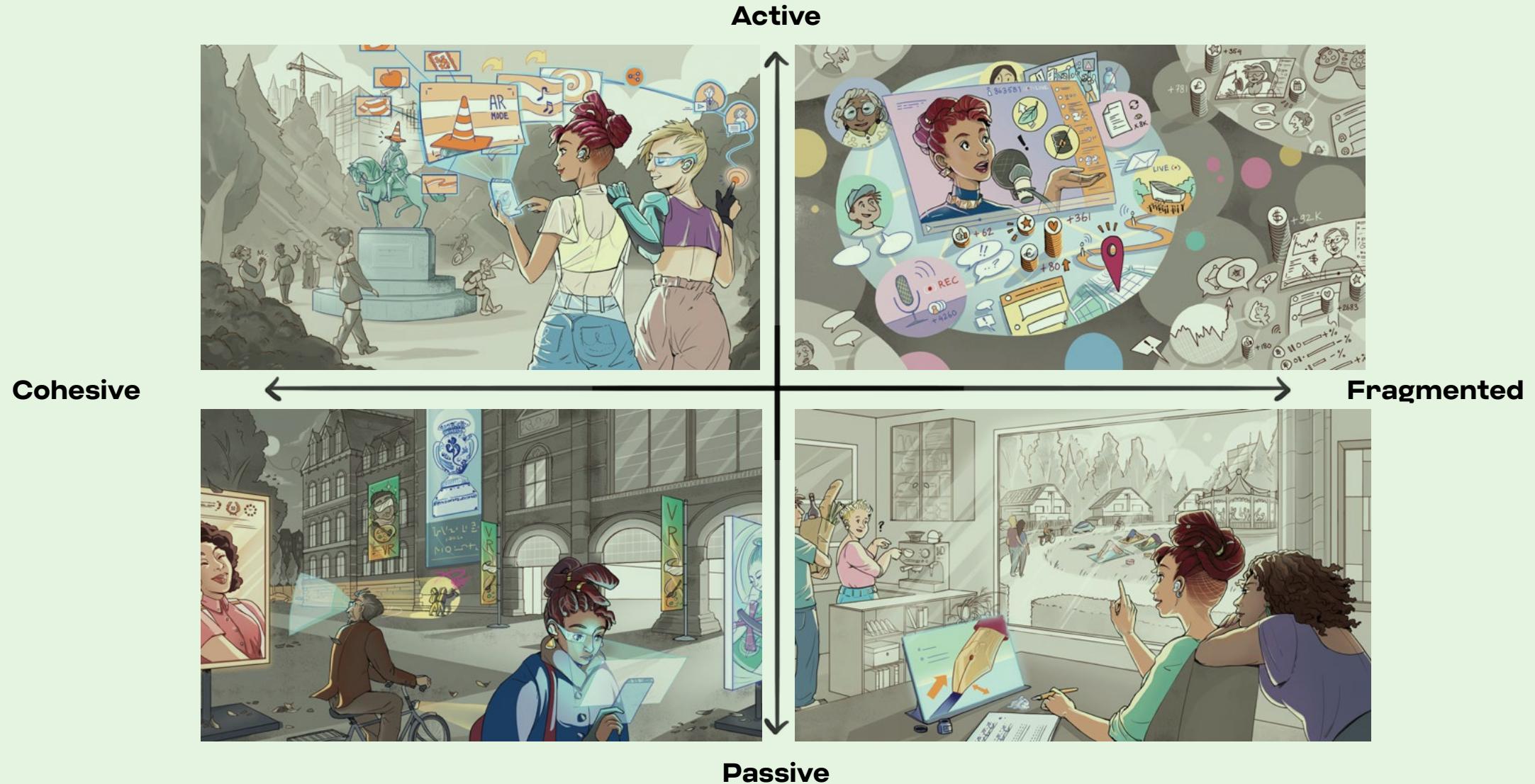
### What is typical for Naomi's generation?

1. Consumption: Gen Z is the fastest growing group of consumers. Naomi is less interested in personal ownership, she prefers access to services. For instance, through online platforms.
2. Personal expression: Naomi uses digital technologies to express herself. She expects fast and frictionless omnichannel interactions.
3. Sustainability: Naomi contributes to building a better world and expects the same commitment from organisations.
4. Inclusiveness: Naomi has grown up in a diverse society. She's openminded and values integrity, and transparency.



Source: a.o. Mazen Ghalayini

## 5 A guide to the audience of the future



## 6 A guide to the audience of the future

### Step-by-step approach to a scenario session

Do you want to explore these scenarios in your own team? The step-by-step approach outlines a scenario session. The four scenarios offer a fruitful starting point, but you should also try to form your own picture of the future and what that picture might mean for your organisation.



#### 1. Gather a diverse group of people

A scenario session is all about combining the power of ideas and the imagination. So it's best to gather a diverse group of people, perhaps also including some from outside the organisation. By combining different backgrounds and disciplines, you can produce multiple perspectives. These insights can help you design a forward-looking strategy.



#### 2. Define the most important issue

What is the most important issue? What should the discussion address, at the very least? Your most important issue should be the main discussion point. Always ask the question: how can we, as a cultural institution, remain relevant in each of the four possible scenarios?



#### 3. Immerse yourself in the scenarios

The participants should prepare for the scenario session by interpreting the four illustrated scenarios on the previous page. Bear in mind the most important issue. A more indepth description of the scenarios is provided in the annex to this guide.

## 7 A guide to the audience of the future



### 4. Ask further questions

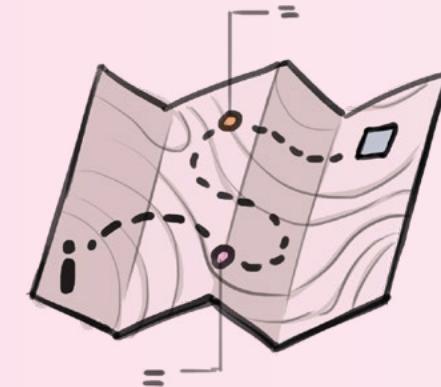
To get the scenarios clear you can ask further, related questions. You can for instance try to answer the questions below for each scenario. Even if you only answer some of these questions, it can help jumpstart the discussion.

1. How do Naomi and her generation experience culture?
2. What role do cultural institutions fulfil in society?
3. Have any radical changes occurred in the cultural sector?
4. Who is the main financial sponsor of the cultural sector?
5. What role have audiences assumed?
6. In what way are makers influenced by societal developments?
7. What major changes have occurred in the cultural offer? (e.g. digitisation, inclusiveness, influence of external industries)invloed externe industrieën)

Try to formulate some of your own questions to help elaborate the scenarios in more detail. Once a clear picture has emerged, you can choose to identify the risks and opportunities for your institution under one or more of the scenarios.

Some further questions could be:

- What do the various scenarios imply for your organisation?
- What opportunities and challenges do the scenarios pose?
- What are necessary conditions for your organisation in each scenario?
- What can we do now to anticipate potential developments?



### 5. Revenue

The step-by-step approach will hopefully yield insights that your organisation can convert into strategy. That way, your deliberations will result in a better preparation for the future, also with regard to the issue of the digital transition.

Scenario sessions can help to produce out-of-the-box solutions and bold steps forward, so that everyone in the organisation is on the same page as you head towards the future.

## **8 A guide to the audience of the future**

Elaborating scenarios contributes to a clear commitment, new alliances and social capital. It marks the start of a new agenda and a shared narrative for the future.

Choosing to renew and responding to change only works if the organisation shows leadership. The organisation should be confident that an unconventional approach is appropriate to the changes confronting the cultural sector.

### **What's next?**

Record the main results of your scenario sessions and then ask: what can we start doing differently tomorrow? This can help you determine your organisation's strategy. It is furthermore advisable to regularly evaluate your findings and plans. What do we know now about the future? How might or does this influence your strategy?

By looking back and adjusting course you can continue to discuss the future within your organisation and thereby help your organisation to remain agile.



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knowledge insititute for culture  
and digital transformation,  
created in collaboration with  
Freija van Duijne.

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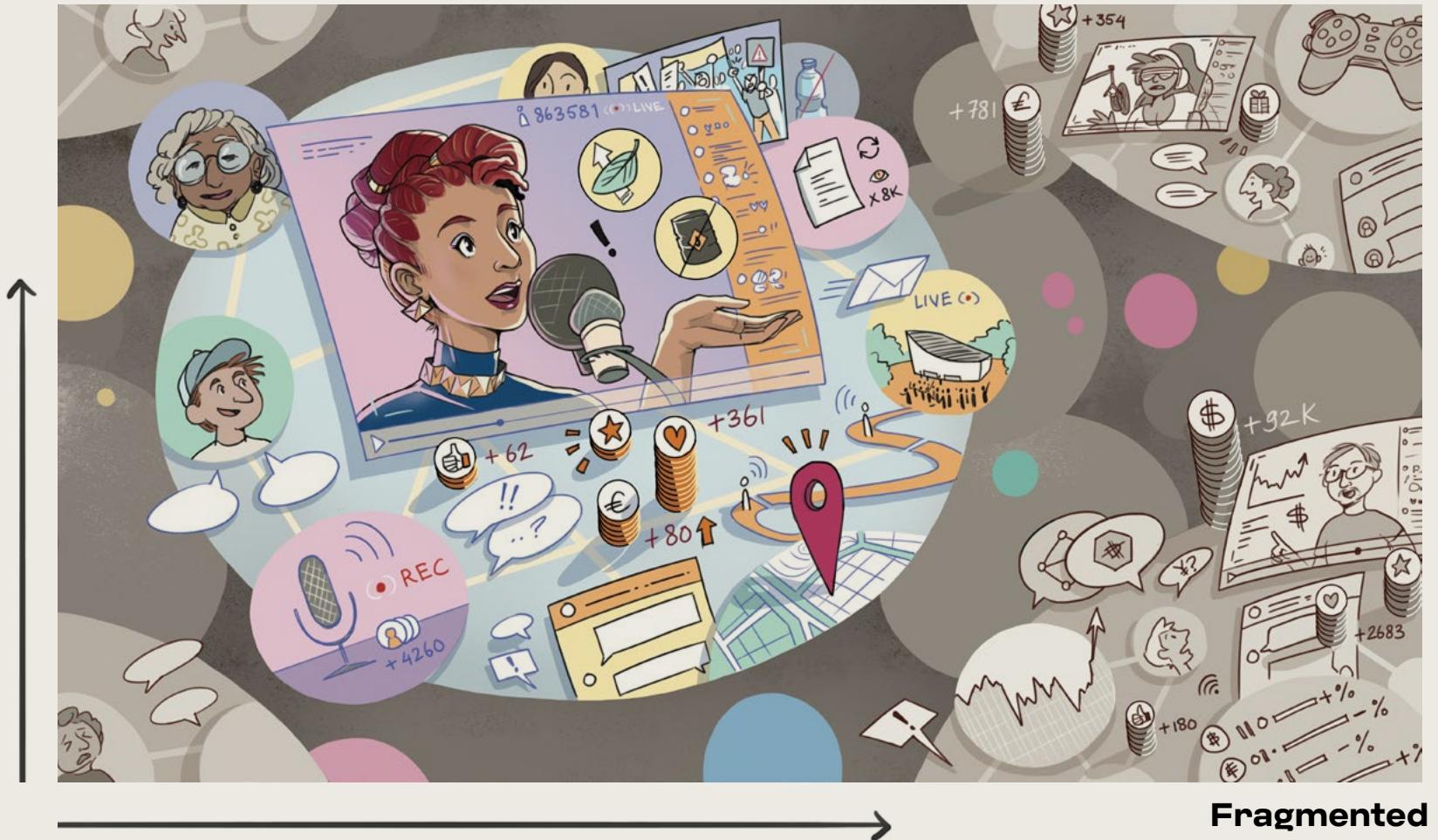
**Cohesive**

**Active**

### **Scenario 1**

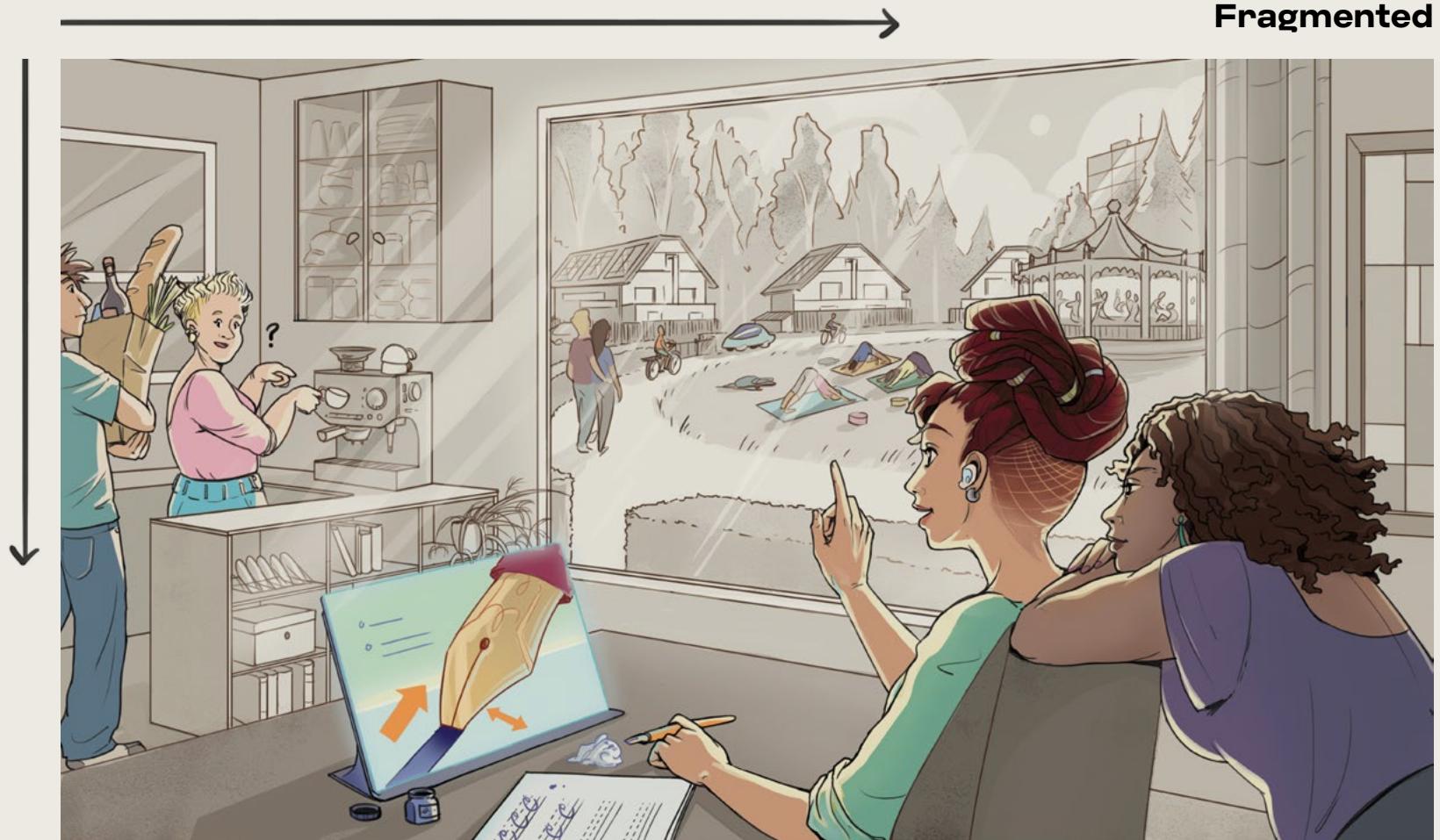
Lots of cultural institutions were forced to shut down as subsidies were cut. This opened up an opportunity for Naomi as a programme maker. She is part of an international talent hub where participants co-create and exchange collections. Hybrid forms, blended genres and remakes are proving hugely successful. Is this the new form of culture?

## Active



## Scenario 2

Naomi is a leading online cultural influencer. She is a strong advocate for climate and sustainability, but also shares entertaining content about her own life. The whole world is her stage. She reaches some 2 million people every week who actively share her content. Businesses and artists are eager to jump on board. But lots of other people are not interested in what Naomi has to offer; they have other interests and inhabit other bubbles.



## Fragmented

### Scenario 3

Naomi lives in a community outside of town. Dwellings are more affordable here, and there is a stronger sense of solidarity. Moreover, everything here is within arm's reach: shops, sports facilities, and a diverse range of cultural offerings. Naomi can choose to do whatever suits her, and also does things online like a calligraphy course. She isn't very active on social media and only shares things if she really feels it's worthwhile.

## Passive

## Cohesive



## Passive

## Scenario 4

The museum square is full of adverts: a VR experience in the museum, a Spanish performer at the pop music venue, dancing with drones. Unlike the younger visitors examining what's on but not finding much of interest, there's one thing that Naomi is certainly keen to visit. But would she feel at ease in these traditional temples of culture, or would she prefer to see it online?

# The four scenarios with respect to the cultural audience of the future

## The quality of the four scenarios

Scenarios describe the future, and that includes matters not yet possible today. The four scenarios comprise both positive and negative elements, surprises and familiar things, extremes and averages.

There is no doom scenario, nor a utopian one. The future is also not a straightforward continuation of the present. Scenarios show the potential directions that developments can take.

Against the background of DEN's mission to utilise the opportunities of the digital transition for the cultural sector, the future scenarios were conceived based on the following two questions:

- What does 'culture' mean for the audience of the future and how will the public participate in culture in the intermediate term (in 5 years from now) and in the long term (15 years from now)?
- What role does the digital transformation play in this?

The scenarios were drawn up following three interactive sessions with 29 experts of various backgrounds.

## Axes of the scenariosA

A technique using two axes was chosen to develop the four scenarios. These two axes represent the main drivers and main uncertainties that appear to be most influential as we move toward the future. Other influential trends

and developments are referred to in the elaboration of the scenario stories, that is, the narratives.

The choice of these scenario axes resulted from an analysis of the trend survey and trend workshop. The workshop was devoted to a further exploration of the impact and the uncertainties associated with the trends, as identified in the survey. Themes that frequently recurred in the discussions of the first workshop also helped to develop the scenarios.

## **Axis 1 - Degree of diversity (multivocality & variegated): cohesion versus fragmentation**

The theme of diversity was chosen on account of the current prominence of the issue and the expectation that it will remain top of the agenda for the coming years and will result in changes. There will be an increasing diversity in terms of backgrounds, experiences, needs and expressive forms. It is unclear in what direction this trend will develop. Will we find increasing unity in diversity, or will increasing diversity lead to fragmentation?

**'Cohesion':** Inclusion of wealthypoor, old-young, cultures and backgrounds, people with impairments; room for subcultures, disintegration of traditional art

forms, cross-overs; harmony.

**'Fragmentation':** Each for their own, 'hermitting', conflict & polarisation, dispersion; competition between regions, importance of local values, nationals/'localism', more small niches and more diversity in cultural expressions.

## **Axis 2 - The role of Gen Z: active versus passive**

Wikipedia defines Generation Z (Gen Z) demographically, as the generation succeeding the Millennials (Generation Y). There is no clear definition of Gen Z so far. People born between mid- and end1990s and 2010 are generally seen as belonging to this generation. Gen Z individuals have usually been familiar with the internet from a young age on and are adept at using technology and social media, for which reason they are sometimes referred to as the i-generation.

The role of Gen Z was chosen since this generation is truly

the first to grow up with digital technology, which has a major impact on how they experience or participate in culture and entertainment and how they build networks. It is unsure whether they will take a leading role (active) or not (passive)

**'Active'**: The new generation raises its voice: unconventional, confrontational, entertaining; anxiety among other generations for decline; nostalgia.

**'Passive'**: PR machines, consumerism. Public authorities and other public entities play a large and active role in the cultural landscape.

## **Construction of the scenarios**

The scenarios describe various alternative, distinctive stories about the future. They are coherent narratives with their own internal logic and flow from the past to the present to the future. As such, they present plausible and potential futures. They contain both positive and negative elements, so none represents an ideal. We will first describe the 'starting situation' to clarify how we wind up in each specific future.

How people in each scenario emerged from the corona pandemic is an important question when looking at the future in 5 years' time, given the impact of the countermeasures on the cultural sector.

Each scenario shows a different form of resilience. For the longer 15-year term, the effects of the pandemic are less noticeable and other developments have had a bigger impact. That is why the scenarios can be treated independently of the corona pandemic, and their value does not depend on the short or long-term impact of the pandemic.

The narratives furthermore address:

- The degree of trust in public authorities and the role of traditional institutions
- The concept of cultural understanding and the societal relevance of culture;
- The role of culture in our society and how culture is experienced;
- Business models;
- Economische structure;
- Europe's role and the mobility of people and things (e.g. museum materials, performances, contemporary art);;
- Data and privacy law.



## **Scenario 1: Gen Z as active shapers of culture, diversity has led to cohesion (top-left)**

**Starting situation:** Long-lasting depression, substantial decrease in tourism, severe cuts to art as leisure time activity.

**Mate van diversiteit:** Cohesion, stimulated by Gen Z (focused on inclusiveness, participation, experience & creative expression, innovation)

**Cultural drivers:** Gen Z – the new programme makers – leads the way, connecting people

**Societal relevance:** Culture serves experience, recognition and provocation; cross-pollination;

cultural preservation – individual institutes, heritagem ‘culture of national importance’.

**Place of culture:** Close to people in (super)platforms, schools, neighbourhoods, community centres, in international networks.

**Business models:** Innovation, lowbudget, wide reach, accessibility – everyone participates, international reach, co-creation.

**Type of economy:** Transformative, value-driven, ‘egalitarian’, participative.

**Role of Europe:** Fragmented, weak

**Data and privacy law:** Privacy as a fundamental value worth fighting for.

## **The audience of the future**

- Older generations: reliving the olden days, looking back at the past, some embrace new developments
- Younger generations: see and seize opportunities, raise their voice, strong need for sensation and to be part of cultural experiences
- Art as a means to raise issues, to provoke and express opinion
- Strong desire for art and culture among the young and the elderly
- No clear distinctions between makers and consumers
- Strong degree of accessibility

## **Culture as a shared space for creation and experience (virtual and/or physical)**

A turbulent period that started with the corona crisis has shaken all of society and cultural life to its core. Although everyone hoped that the recession would be short-lived, we were confronted with a long-lasting, deep, worldwide depression. Europe fragmented under pressure of the depression.

The effects of this depression were felt at various levels. A strong decrease in tourism and severe cuts to everything labelled ‘leisure’ and ‘subsidised hobbies’ meant that the cultural sector was forced to reinvent itself. Once familiar and flourishing

structures, infrastructures and initiatives collapsed for lack of money and ambition. This wasn't helped by the fact that the cultural sector was barely represented in administrative circles and hardly any political lobbying took place. Funding for subsidised art was dramatically reduced and the Ministry of Education, Culture and Science was renamed as the Ministry of Education, Science and Culture. Prominent and alternative performance companies were disbanded and many regional museums were forced to shut down. This hurt the institutions and all suppliers and the faithful visitors and surrounding residents. The idea of setting up a regional cultural infrastructure (RIS) ran out of steam, so that a thriving cultural ecosystem at the level of an urban cultural region and a coherent,

self-enhancing system of cultural facilities failed to materialise.

Given the uncertainty for those who remain, people have started focusing more on the short-term with a fluid and flexible cultural offering. Responding to topical developments is important. Funding does remain available for the 'preservation' of culture, especially for individual institutions designated as being 'of national importance'. This means, in practice, that funding is devoted to culture in the cities, such as the Rijksmuseum and urban architecture, and to castles and landscape heritage outside the city.

Although many cultural organisations are no longer physically present in cultural life, there remains a digital offering of large and small

'stories' characterised by multivocality. Digitisation promotes democratisation. The algorithms of video channels and social networks are deliberately designed to help people discover other subcultures and forms of performance. This is refreshing and innovative and helps people and the cultural sector come closer together. Yet despite these digital offerings, the cultural sector largely disappears from the public domain.

The resulting vacuum is however quickly appropriated by Gen Z for whom this new situation represents new opportunities. Gen Z was quick to gain a seat at the discussion tables, heeding the motto that 'if you don't have a seat at the table, it means you're on the menu'. They take the role of new programme makers and have joined in the

debate in order to get policy makers and politicians on their side. At the intersection of the virtual and physical worlds and of the different cultures, thriving 'talent hubs' and design and development labs emerge with both a domestic and international orientation. Everything is blended. By enabling the audience to participate and making them part of productionssurprising performances result that continue to be talked about via online media. A lot is produced and displayed online, since many of the physical cultural centres have shut down. Hybrid forms combining all sorts of genres are evolving rapidly. With remakes or a nod to old but well-known productions, makers ensure their creations generate lots of hits and shares.

Gen Z makes use of digital artistic

material and digitised collections from the past to create new digital cultural expressions. To an important extent, curating collections happens online, since stories largely consist of digital threads. Everyone can be an authority and can persuasively present own work; you don't need or have many years of training on your CV. In the physical world, museums are structurally reshuffled by taking away all collections and storing them at a single central depot. Curators are no longer tied to an institution but work together in changing teams to organise productions using surprising combinations of items from the depot.

In their natural 'cultural habitat' outside traditional performance and presentation venues, and

inspired by the notion of 'culture as experience', a large diversity of (mainly low-budget) cultural offerings, unexpected crossovers, new distribution channels and innovative revenue models such as bequests and fundraising among tech-millionaires emerge. Everything seems to happen on the basis of co-creation. Everyone is part of something, in one way or another. The older generations who once dominated the cultural world regularly raise serious questions concerning the developments. They see a casual approach in which 'real' art is mixed and overshadowed by what they perceive as quick and easy superficiality.

Both online through digital (super) platforms with a global reach and offline in neighbourhoods, schools and community centres, Gen Z

is able to take art and culture to the people. They also work at the intersection of offline and online in so-called 'Instagrammable Museums', where trained and selftaught artists work together to permanently create new 'experiential spaces'. Here, visitors are immersed in bygone days and cultures, in remote geographical regions, and in alternative, surprising and sometimes confrontational worlds. There are places where young people can create their own content and where older people can relive the past. Some of these places are seen as superficial entertainment by the traditional art world. They aren't challenging enough, don't create any friction.

At the same time, the inclusion of diverse cultures and breaking with the mistakes of the past are

prominent themes, and deliberately used by this new art generation to provoke the public. Debates on societal themes are made more piercing through art and creative expression. People are encouraged to think for themselves through productions using characters with hybrid identities (such as cyborgs) and binary personalities, and by mixing generations and fusing different worlds.

There is a strong desire for art and culture, which goes hand in hand with critical questions about data and privacy. What is permitted and what is not? Culture makers experiment with artificial intelligence to show the possibilities and to promote a dialogue on what it means to be human and what it means to say 'we', in a robotised society. Although other generations

initially treated the advent of the 'Gen Z culture' with suspicion and scepticism, a large proportion of people eventually recognises its added value: they realise that they can continue to cherish what once existed and what makes up their own identity precisely by embracing the new. Under pressure of the older generations, the treatment of personal data has been furnished with proper protection, giving citizens a strong position. This way, Gen Z manages to connect with new audiences that are willing to pay for digital arts, as this also makes you a part of it.

From poor to wealthy, from city to region, from young to old and across all colours and cultural backgrounds: everyone has access to art and creative expression. This is stimulated, importantly,

by customised offerings, a differentiated pricing policy, and by targeted efforts to reach a diverse audience. Without saying so emphatically, Gen Z aims for the entire cultural infrastructure: from online learning communities to discovering culture to talent development, and from genre development to high-quality cultural offerings with both domestic and international reach.

## **Scenario 2: Gen Z as active shapers of culture, diversity has led to fragmentation (upper right)**

**Starting situation:** No events for two years, young people most affected

**Degree of diversity:** Fragmentation – between generations and social groups, competition between regions

**Cultural drivers:** Gen Z, influencers (in collaboration with science and especially European and regional governments)

**Societal relevance:** Culture as entertainment, building and consolidating identities, crosspollination, regional profiling

**Place of culture:** European networks, regions become more interesting culturally

**Business models:** Large-scale happenings – first ads on YouTube, sponsoring by big businesses, sale of data, pop-up experiments with online/offline combinations

**Type of economy:** Transformative, value-driven, sustainability

**Role of Europe:** Collaboration between European regions

**Data and privacy law:** Privacy, personal preference: luxury item or barely objectionable

**Type economie:** Transformatief, waardengedreven, verduurzaming

**Rol van Europa:** Samenwerking tussen Europese regio's

**Data- en privacywetgeving:** A Privacy, eigen invulling: luxe goed of gebrek eraan nauwelijks bezwaarlijk

### Audience of the future:

- Older generations: resistance to change and fear of cultural 'decay'; some see added value of 'new culture' and remain an eager culture consumer
- Younger generations: propagate Gen Z identity, experience, active in international community, resistance to 'old culture'
- Art as an answer to major societal issues, accountability
- Audience is fragmented ('old' versus 'new' art), friction between communities with different identities. Communities are active, indirect makers on own channels and influence the follower artists

### Cultuur met 'Signature Gen Z'

Given the changing composition of the population due to migration and ageing plus a long period of economic downturn, much was asked of young people's sense of solidarity. As a result, the already emerging fragmentation between generations came under pressure. This was exacerbated further by the corona pandemic: although young people were personally much less at risk, they did suffer under the strict measures imposed. For two years there wasn't a single festival or event – at least not live, since they were able to attend shows through games like Fortnite. When things loosened up again, like-minded young people were quick to meet each other again in the open air, at forts and bunkers, at archaeological sites and old buildings.

Starting with small parties, it soon evolves into a mosaic of happenings with many followers from the surrounding area. Artists increasingly become involved, from graffiti art to musicians and dancers, from light designers to sculpture artists.

And if they are, then so are their online followers via social media. These online followers, in their turn, are actively involved by exchanging fan art and fan fiction (their own cartoons and stories) and by the conversations carried on among and between these communities. As a result, they often influence the makers, so that the distinctions are increasingly blurred. Money for these happenings was earned initially through adverts on the front persons' YouTube channels. Once things got

bigger, the municipalities were eager to join in and all sorts of businesses offered to become sponsor.

The young see opportunities to start doing bigger things again and to show the rest of the country what their village and region has to offer. AI and VR companies are quick to sponsor them as a way of showing that they are engaged at the grassroots level, where it's all happening. The organisers of art projects and experiences use their equipment and software to demonstrate the possibilities. Without beating the drum about it, it turns out that these companies also earn a lot from all the data generated as part of these happenings. Some of the organisers realise that these big tech companies ('data grabbers'), with their customised

offers of information, knowledge and entertainment, are actually contributing to fragmentation. Some of the communities have therefore decided to ban these sorts of activities, because of the violation of privacy which some subcultures find very objectionable. There are also places where not much is happening. Poverty in vulnerable neighbourhoods has increased. Attempts by municipalities to stimulate initiatives are unsuccessful, since it simply won't happen without a foundation laid by innovative initiators.

All cultural expressions need to carry the Gen Z signature. In truth, they find it amusing that many elderly people, Millennials and even older, are so concerned about this. These older generations feel that art has become pure entertainment

and is too much under the influence of money and the principle that 'Money Buys an Audience'. Many find it worrying that everyone is free to determine what quality means. They fear a commercial buyout of independent makers and institutions, and many new initiatives and artistic expressions are viewed with suspicion. How can you run a (digital) museum without a properly trained curator? At times, all you see are stories that have no bearing at all on any traditional context (unsurprisingly, if you let everyone have their say), but there is a lot of audience for them. And then part of the audience is sitting at home, chatting with friends who are also at home, watching films about others engaged in a game as part of a happening. But there are Gen Z culture makers who offer an alternative.

Not the kind of art that is produced today, displayed tomorrow, and gone the day after; but 'durable' art that addresses, questions, interprets and even solves important societal issues. Art is deployed for instance to offer new perspectives and approaches for intractable phenomena such as climate change, poverty and plastic waste. These artists manage to set up new social movements centring on such 'wicked problems', for which art, science, the private and (regional, European) public sectors join forces. It often amounts to a combination of making venues available, taking a driving role by financially sponsoring artists, involving the education sector and designing a layered (online and offline) media strategy. Talented people jump on board, also internationally, since online collaboration is a matter of

course for Gen Z. An international community emerges that comes to be known as 'The World is Our stage' (TWOS). Certainly in EU countries the young people know each other, even if they have never met face to face. Many forms of cross-pollination occur and all sorts of international and local niches and initiatives are established. This way new communities are formed, sometimes in surprising locations (online and offline, and in combination) with unforeseen impact.

Communities often have a strong identity and resist people with another identity; whether these are elderly people, or people with a certain taste that the community disapproves of. Similarly, young people strongly question the system of economy and society

and resist the 'old' culture. At stake is the question who determines what culture is and what the value is of cultural expressions. The result is that the cultural sector and its audiences become fragmented: one part chooses to follow in Gen Z's footsteps, another part seeks to preserve cultural heritage; that is, 'what once was' and 'how things were done then'. Museums, films and theatre companies are constantly interrogated with regard to their narrative and are continually forced to justify their choices towards their audiences.

Sustainability is paramount, in everything. Sustainable power generation, sustainable food production, cutting packaging and waste to a minimum, recycled art, reusing vintage clothing – duh, it's simply what you do. Gen Z often takes it one step further, showing

the rest of the world 'the right way'. A lot of people look up to influencers, who have become very wealthy. Yet at the same time it's clear to everyone that economy, in this way, is about much more than earning money. The value created by working together in your own community is priceless.

### **Scenario 3: Gen Z as passive designers of culture, diversity has led to fragmentation (lower right)**

**Starting situation:** Economic crisis affected (nearly) all layers of society, concerns about the future

**Degree of diversity:** Fragmentation – between generations, social groups, competition between

regions, cultural bubbles of which some are inclusive

**Cultural drivers:** Municipalities, neighbourhoods and social actors with the support of Economic Boards

**Societal relevance:** Culture as vehicle for quality of life, solidary, economic development

**Place of culture:** Diverse range but not much cross-pollination/crossovers in the periphery (small towns and villages), neighbourhoods and regions

**Business models:** (Economic) profiling of regions, favourable business climate for companies, tourism

**Type of economy:** Focused on recovery, seeking alternative

carriers, collaboration, sustainability

**Role of Europe:** Collaboration through European programmes and between sister cities

**Data and privacy law:** Privacy as a human right

### **Audience of the future**

- Older generations: worried about change, happy with on-demand options to enjoy culture at home
- Younger generations: hesitant to take responsibility, culturally active but not very visible
- Art serves to discover and create personal identity

- Various niches (including 'old' genres, non-western), but few cross-overs (fragmentation)
- Consumers of culture live in 'bubbles' with like-minded others, mainly passive with sometimes an emoticon or selfie as form of interaction
- Intimacy in the relationship between artist and audience is nourishing for both parties

### Culture in small circles

The day we stood shoulder to shoulder on Dam Square and in other cities to put an end to institutional racism once and for all became an important element in our collective memory. Yet however

much this bound us together and although much changed in how we addressed inequality in all sectors of society (such as education, job market, housing market, law enforcement, jurisdiction, the public debate), in the longer term it did not really bring us 'together'.

Yes, 'Black Peter' and other symbols of colonialism disappeared from public space. And indeed, new legislation had a positive impact on countering segregation and socio-economic disparities. We have become much more aware of the power structures underpinning our society and how this is to some people's benefit, deliberately or not. And we realised that this is not only to the detriment of people whose roots lie outside the Netherlands, but also of other groups such as people with a physical or mental

handicap, with lower education qualifications, people living in deprived neighbourhoods, and members of the LHTBQ community.

The economic crisis that affected almost all layers of society, the fear of change and for the loss of perspective and concerns about the future turned out to be stronger than our wish to bond together more closely. This resulted in a fragmented society and a desire for 'the old'. Cultural genres that were previously popular mainly among the 'boomers' of back then, such as opera and classical music, jazz and rock remain popular, but in increasingly smaller niches; both in theatres and increasingly often 'at home'. Given the dwindling number of fans, theatres and performance venues had to shut down, and the cultural activities moved to YouTube

and similar platforms, for instance of the public media companies. In this way, elderly people and other groups who prefer not to go out can still enjoy their favourite forms of culture, where and whenever they want to. Although the cultural offer has been enriched considerably by 'new', non-western cultures, cross-overs barely occur and the different genres are not very successful in linking up different groups in society. The cultural sector appears to be just one more bubble within an increasingly diverse society. Attempts to establish bridges mainly provoke verbal attacks on each other's identities. Culture makers need to be alert to the risk that they can offend people through their cultural expressions. In some instances this has even led to censure.

Young people do engage with culture, but not very openly. Older generations see this as being passive. Young people feel uncomfortable about taking responsibility. Before you know it, things go wrong. Everyone is so critical nowadays. Almost everyone is busy creating things. It's a need that arises from within and that helps people to discover and confirm their own identity. But creativeness is mainly enacted online, and creations are only displayed in small circles. In daily life people mainly just want to have fun. And the less serious the better, it's really just about having a laugh.

Since the corona pandemic, and the massive transition to online life, it no longer feels necessary to live in large urban areas. People wanting to buy a home are mainly looking

in smaller towns and villages. Some regions are able to benefit from these trends. Culture is seen as a vehicle to strengthen the quality of life and sense of solidarity in neighbourhoods, municipalities and regions. Municipalities, neighbourhoods and social sectors collaborate closely and are supported by the Economic Boards. Connecting with European programmes and sister cities also offers attractive opportunities. Thanks to all sorts of (public) data regarding consumers and residents, they are better able to respond to residents' cultural needs. Within regions, each community has its own concept of culture, ranging from gamers to dance crowds, cosplay fans and nature lovers. Cultural programmers, representing a wide range of institutions, are compelled to assume different

guises in order to appeal to all the different target groups. Thanks in part to EU funding, some regions manage to swing the spotlight on their own identity, idiosyncrasies and stories – possibly in dialect – through their specific cultural offerings. In doing so, they connect with other regional themes such as the sustainability of food production and power generation. Besides offering a pleasant environment to live, these regions are popular with tourists and an attractive base for businesses. At the same time, other regions are getting poorer. Especially here, various 'Support-Your-Local' initiatives are launched. As a consequence of this 'localism', cultural entrepreneurs also aim to market their services and products locally, neglecting the opportunities at the national and international levels.

Most of the young people ignore these regional initiatives, and they also feel little affinity with European ideals. They meet each other – as do other groups in society – in their trusted (online and offline) 'bubbles of like-minded people': in their online networks, in the neighbourhood, in school, at work among colleagues and at living room concerts and micro happenings with close friends. This intimacy is an important element in the experience of creative expression.

#### **Scenario 4: Gen Z as passive shapers of culture, diversity has led to cohesion (bottom left)**

**Starting situation:** Scarce funding for the cultural sector, weakening of cultural life, concerns for vulnerable

neighbourhoods

**Degree of diversity:** Inclusion (but Gen Z is difficult to reach)A

**Cultural drivers:** National government, mayors, economic councils, educational institutes and other administrative networks; influencers and other artistic heroes, sponsored by major tech and sports fashion businesses

**Societal relevance:** Culture as a vehicle for connection, personal encounter, cross-pollination. Thematic programming (through the EU, national government, municipality): 'The year of...'

**Place of culture:** National, in major cities, culture in the neighbourhood, via platforms and festivals

**Business models:** Blockbusters, VR technology, gaming, layered

multimedia campaigns

**Type of economy:** Focused on recovery, seeking alternative carriers, collaboration, sustainability

**Role of Europe:** Fragmented, financing art as a vehicle for connection

**Data and privacy law:** Data generate prosperity, privacy is optional

### Publiek van de toekomst:

- Older generations: seek to connect with others, shared identity
- Younger generations: hard to reach, do not feel personally addressed, fragmented group (partly passive, partly pragmatic, partly activist)

- Driven by social justice, grand narratives

- Art as a tool to strengthen (national) identity and to foster bonding in society

- Large measure of accessibility, collective cheering, collective celebrations
- Audiences promote the narrative of inclusiveness

### Culture for identity and cohesion

It was an odd sight: all those empty streets, usually full of domestic and international tourists. For several years hardly anyone came to visit, and so there wasn't much point to organising large exhibitions and events. It was also hard to find funding. Sponsors withdrew and the financial reserves of

public authorities were required to help the economy recover. There were concerns about the further deterioration of vulnerable neighbourhoods.

Mayors, economic councils, educational institutions and other administrative networks joined forces to not only revive the economy but also cultural life. A national theme was announced and the first events took place online; among them, 360-degree panorama photographs of national heritage with stories that bind the population together.

In a next phase, events were largely held in the open air with lots of precautionary measures. The goal was to foster connection and to touch people through culture. Community workers were involved to help identify gems and to establish

connections between music, dance, painting and other performances. Gradually things start to pick up for the Netherlands and Europe. Cultural life, too, regains vigour. Public authorities see culture (in the form of professional art and amateur art) as a powerful tool to strengthen a shared identity and to promote societal cohesion. A large share of national funding is devoted to cultural 'high-flyers' and excellence programmes, and what remains is fed into 'liveability budgets'.

Large events are held again, like the ones from before the crisis. More than previously, the focus is on the real 'blockbusters' who are sure to draw big crowds and generate a lot of revenue for the organisations. But individual artists who manage to position themselves as a 'brand' are also popular with

municipalities as part of their city marketing campaigns. Merchandise is an important source of income for both institutions and individual artists. In these uncertain times, this success formula works best for sponsor recruitment and publicity. Thanks to digital technologies, flashy programmes, high-quality streaming platforms and much talked-about events can be organised that draw a large and diverse audience, also and especially online. Productions that were almost exclusively offline before now rely on a robust online presence to feed the hype surrounding their exhibition or event. After all, this has been shown to boost revenue.

Europe also contributes by funding large (leading) museums who together relate the grand European narrative. One of the reasons explaining the success of this

endeavour is that these museums not only offer a physical visitors' experience, but also a fascinating and immersive online experience.

The museums also ensure that a European history canon is compiled to serve as an inspiration document for schools all across Europe. Exchange programmes are also organised, specifically with the goal of activating Gen Z and to stimulate this generation's interest for the story of Europe.

Unlike before, a lot more effort is made to appeal to a diverse audience. Not just because one 'must', but also inspired by a widely shared sense of social justice. More than previously, 'classic institutions' such as libraries and museums serve as cultural meeting spots. That this also boosts the institutions' income is a welcome

bonus.

Grassroot movements consisting of all sorts of people in society emphasise the importance of justice and are quickly supported by various societal groups. This includes business people and commercial companies who voice their views, adjust their operational management, and fund new initiatives. Programme makers are assessed by both their public and private financiers with regard to how they manage to engage with various groups in society. Wheelchair accessibility is important, and people with visual impairments must always be taken into account. People are trained in digital literacy by community teams.

Particular attention is devoted to cultures that have been part of society for several generations but

whose role in cultural programming has always remained limited: communities with roots in Suriname, the Caribbean area, Turkey and Morocco. These communities also have important stories to tell about the Dutch past, present and future. Artists from these communities are highlighted and their work is made part of the bigger narrative. All these cultures, including the Dutch, increasingly blend together. The main sponsors of this trend are the big tech and sports fashion companies, as they realise better than most that society is becoming more diverse and mixed. Through layered multimedia campaigns with top-of-the-league influencers, musicians and other artistic heroes, the message is disseminated further and further. Through the data generated by these campaigns, the sponsors gain steadily more insight

into their target groups. Whoever supplies data as a consumer and culture audience is richly rewarded in return, so that privacy is not perceived as a big issue.

Although culture is meant to bring people together, a large number of young people remain hard to reach. They don't feel much affinity with culture as presented to them, and because they are approached as a single cohort, they do not feel personally addressed. They see all cultural manifestations as conservative, populist and nostalgic. Yet another VR exhibition on Van Gogh cannot interest them, even if it is incorporated into a game. They seek connection and meaning through online games and social media channels.

Part of the young people adopt

a pragmatic attitude: if the government sees art as a tool, then we'll make it work for our own purposes. Thus, they will participate in productions they feel are nostalgic, while finding room for real expression in their own world. By contrast, another part of the young generation is activist. Based on the sense that they have nothing to lose, they revolt against the prevailing but constraining cultural sector. Inspired by the punk groups of the 1970s with whom they feel affinity, they paint the walls of the Rijksmuseum (a symbol of national culture) and they occupy the Ministry of Education, Culture, Science and Cohesion..

# Future challenges and opportunities

What lessons can we learn from these scenarios? What are the most important challenges and opportunities for the cultural sector? In this section we first describe the main transformations in the sector. By then specifying these transformations per scenario, we can form a picture of the bandwidth of possible developments. This is followed by the perspectives for action that result when we consider all four scenarios.

## Main transformations

**Transformation of the concept of culture:** We see that the concept of culture itself is changing. Audiences and makers are gradually starting to define art and culture in a different way. New online and offline experiences add new elements to the familiar understanding of art.

**Transformation of the cultural landscape:** The transformation of the concept of culture has an impact on the institutions and other parties in the cultural landscape.

**Transformation of culture makers and audiences:** The relationship between art and culture makers and their audiences takes on a different character, with changing roles and patterns.

**Transformation of business models:** All of this has consequences for future revenue models.

## Transformations per scenario

**Scenario 1: Gen Z as active shapers of culture, diversity has led to cohesion (top left)**

### Transformation of the concept of culture

Art and culture are defined in broad brush strokes. It's first of all about entertainment, and society is verymuch open to all sorts of hybrid forms of art and entertainment. A lot is produced and shared online, which accelerates developments.

Quality is 'whatever floats to the top', independently of traditional criteria.

#### **Transformation of the cultural landscape**

Power structures and hierarchy no longer prevail. The ideas and wishes of makers, audiences and institutions fertilise each other. Collaboration goes beyond cultural institutions only. The cultural function of libraries and other meeting spots is developed further. There are barely any limits to the collaboration in terms of sharing depots and archival materials.

#### **Transformation of culture makers and audiences (creation, perception and consumption of culture)**

The audience is part of the creation process, both online and

offline. Online communities, for instance fans of a certain genre, have a strong influence. For online productions, the audience can actively participate in shaping what they get to see and experience. Makers are eager to make use of this. Art is a source of stories with which to help shape the future. The voice of non-western cultures is actively incorporated to build an inclusive narrative and an inclusive society. Images are disseminated instantly

throughout the public dialogue through digital media. The boundaries between generations blur; what matters above all is to understand one another's mindset. In the same way, makers and audiences connect.

#### **Transformation of business models**

Public authorities invest in user spaces and personnel to support makers. It is a non-financial revenue model, through which authorities and other stakeholder aim to draw on citizens' involvement with culture to nudge societal issues in a desirable direction. This is referred to as the 'commons model'. The traditional role of subsidy provider disappears, and with that, a lot of the traditional art and cultural offerings. Makers who pursue an intensive relationship with their audience (online and offline) do manage to attract various funding sources, ranging from commons funding to subscriptions and private sponsors

#### **Scenario 2: Gen Z as active shapers of culture, diversity has led to fragmentation (upper right)**

#### **Transformation of the concept of culture**

The concept of culture is transforming fast. Culture is seen by many as a form of entertainment. There is a debate about who gets to define quality and about the value of cultural expressions. Is everyone free to determine what quality means? And it is alright for art to be determined by 'big money' and by the principle of 'Money Buys an Audience'?

#### **Transformation of the cultural landscape**

The struggle to determine 'what is culture' leads to a fragmented cultural sector and a fragmented public. Makers, audiences and institutions do manage to come together in the face of so-called 'wicked problems'. The culture

sector, science and the government also team up in an effort to deal with these problems. New forms of collaboration emerge, especially online and beyond national borders. Big tech companies have gained a strong position in the cultural landscape.

#### **Transformation of culture makers and audiences (creation, perception and consumption of culture)**

There is a lot of innovation and a blend of online and offline artistic expressions, such as the streaming of offline happenings and AI and VR experiences. The audience is both maker and consumer. Part of the culture makers and the public embrace these new developments. Another becomes the steward of 'what once was' and 'how things were done then'. There is much

difference between the generation and various social groups. Communities form and strengthen identities and reject people with another identity.

#### **Transformation of business models**

New large-scale happenings are sponsored by big tech companies. They earn large sums of money with the data generated through and around these happenings. The traditional model of subsidy provider disappears. Municipalities do try to support regional initiatives (as a means to combat poverty in vulnerable neighbourhoods), but they are not very successful. The national government barely plays a role. Strong public-private partnerships emerge to tackle major societal issues.

#### **Scenario 3: Gen Z as passive shapers of culture, diversity has led to fragmentation (bottom right)**

#### **Transformation of the concept of culture**

This is the final phase of a cultural era. New generations mainly enjoy culture at home, alone (online) or with friends (online and offline). The government fails to preserve the old idea of culture in the new era. There is some mourning for the loss of the past.

#### **Transformation of the cultural landscape**

All sorts of micro-communities emerge, small cultural villages, mini bubbles. Various performance venues and other institutions are forced to shut down for lack of public interest. Culture is positioned

as contributing to solving societal issues.

#### **Transformation of culture makers and audiences (creation, perception and consumption of culture)**

Artists are 'idealistic in intimacy'. They zoom in on issues with attention, commitment and solidarity. Larger issues are tackled through smallscale, local and easy-to-handle examples. Small initiatives add up and knock-on effects can make it bigger. Lovers of sub-genres and niches know how to link up (online and offline) and demonstrate their commitment to the makers. People find a sense of identity in these micro-communities, which comes with a sense of pride. Some feel that they belong everywhere and nowhere, and they express their frustration

regarding this fragmented cultural landscape. Institutions take an open attitude to small collectives that are organised with different degrees of professionalism. This implies a lot of flexibility, and the customised approach requires a lot of time on the part of the institutions.

#### **Transformation of business models**

Much of the art is easily accessible. Little is invested in means, and the revenue is low. The emphasis is on applied art and design. This is reflected in the education programmes: the creative sector contributes to solutions for societal issues. Designers, architects and visual artists are also employed by businesses for their (online and offline) identity building.

#### **Scenario 4: Gen Z as passive shapers of culture, diversity has led to cohesion (bottom left)**

##### **Transformation of the concept of culture**

Culture is deployed by public authorities as a tool to strengthen a collective identity and to foster social cohesion. The main goal is to tell 'grand narratives'. There is a widely shared sense of social justice.

##### **Transformation of the cultural landscape**

Major (top) museums and other cultural high-flyers flourish under these conditions, while alternative narratives and art expressions struggle to survive. There is much attention for the voice of different cultures, which become an important part of

the larger narrative. The cultural sector actively collaborates with municipalities, economic councils, educational institutions and other administrative networks to forge connections and to touch people. There is a diverse and lively amateur art sector.

##### **Transformation of culture makers and audiences (creation, perception and consumption of culture)**

Artists work from a widely shared sense of social justice. Regardless of whether they are contributing to large blockbusters or to grassroots initiatives, artists are strongly committed to ensuring accessibility for various groups in society. Flashy programmes are made with the goal of attracting a broad audience, both online and offline. A large number of young people have

trouble connecting with these large narratives. They do listen to the stories, are sometimes inspired by them, but mainly find connection and meaning and the room to express themselves in online games and social media channels.

##### **Transformation of business models**

Public authorities mainly finance cultural high-flyers and excellence programmes and blockbusters, which in turn generate substantial revenue. Institutions and artists who are unable to build on these funding flows can nevertheless benefit, for instance through marketing and merchandise. There is also a lively amateur art sector. Unconventional, innovative and financially successful programmes and projects regularly emerge from this talent pool

**June 2023**

**DEN**