den
Dutch knowledge institute
on culture & digitalisation

Future Cultural Audiences
Four scenarios

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Content

Introduction

The importance of scenario development for digital transformation

DEN is the Dutch knowledge institute for digitalisation in the cultural sector, and supports cultural professionals to exploit the many opportunities that the digital transformation presents.

It is up to the cultural sector to make sense of its changing role in society in the next five, ten or fifteen years. Scenario development can help here as it allows to dream about future directions in society and their significance for the cultural sector. This document focuses on the consequences of audience evolution for cultural institutions, explored through the development of four scenarios. For the scenario development process, and in cooperation with the cultural sector, DEN identified challenges for the next five to fifteen years which are central to the future sustainability of the sector. We focused on two key questions: How does the audience of the future define culture and how do they participate in culture in the medium term (five years) and the long term (15 years)? What is the role of the digital transformation in this respect?

Who are the cultural audiences of the future? What do they consider culture to be? And how is culture actively and passively experienced in a society that is becoming increasingly digital?

The scenarios presented in this document should not be seen as forecasts or predictions. They are plausible stories describing directions in which cultural audiences might evolve. We hope they can serve as the basis for a dialogue with the sector about the implications for their digital strategies.

Resilience and agility of the cultural sector

The purpose of the scenarios is to identify emerging opportunities and challenges in order to proactively develop perspectives for action.

To this end, DEN has formulated a number of follow-up steps in cooperation with the sector. Cultural institutions and creators can also use the scenarios to test their current strategies. This will increase the sector's resilience and agility, and help build a cultural landscape with international significance that is relevant, innovative and future proof.

A note about COVID-19

The conversation about the cultural audiences of the future and the impact of the digital transformation on the perception of culture is, for the most part, not related to COVID-19.

COVID-19 is currently disrupting the cultural sector and its implications have accelerated digital adoption. For cultural institutions and creators, experiences with digital culture audiences due to COVID-19 restrictions have brought home the urgency of the use of digital resources and the need to build on these developments over the next five, ten or fifteen years, now that a balance between online and offline seems to be the new reality for how we experience culture.

Follow-up steps

The first step has been taken. We have drawn up plausible stories of future audiences which will serve as the basis for follow-up with the cultural sector and other relevant parties. These scenarios will be used to engage in meaningful conversations and will be fine-tuned as we move forward.

The next steps to be taken by DEN as part of this process include:

- Spring 2021: Digital technology experts will provide insights and perspectives on trends and developments within and outside the cultural sector. Our aim is to redefine the cultural landscape by incorporating digital innovations in each of the four scenarios. This will enable us to get an idea of the available digital tools and techniques, and explore what place digital will have in society. The output will be used to create frameworks for the online presence of institutions and their interaction with audiences and creators. This will make the digital transformation tangible in each scenario.

- Autumn 2020: The scenarios focus on the possible key roles we expect to be played by the youngest generation, Generation Z (Gen Z). This generation has so far not been included in the process. In cooperation with partners such as MU Hybrid Art House, DEN will invite a number of Gen Z artists to reflect on the scenarios. This will bring the scenarios to life and generate further insights on possible interventions for actors in the sector.

- On-going: Based on the scenarios, DEN will develop a framework for discussing future directions within the cultural sector. The time horizon will be set at five to fifteen years, in contrast to the four-year subsidy planning system which is currently the guiding principle for the development of visions and policies in the cultural sector.

- Spring 2021: Although grass roots and amateur art are mentioned in the scenarios, this topic has only been briefly touched upon in the scenario discussions. However, the grass roots and amateur arts are an important part of the cultural landscape and play a valuable role in the development of tomorrow's cultural audiences. This topic will be further explored with the Dutch National Centre of Expertise for Cultural Education and Amateur Arts (LKCA).

How to use the scenarios

The primary intention of the scenarios presented here is to encourage the cultural sector to use the scenarios as a basis for dialogue in internal strategy sessions or discussions with potential partners. The scenarios have been created for the sector, and we hope they will be used extensively. Therefore, we welcome you to share your experiences with us. Let us know where DEN can be of assistance and what we can do to further improve the scenarios and keep the dialogue going.

The four scenarios on the cultural audiences of the future

The quality of the four scenarios

Scenarios are narrative descriptions of possible futures. Scenario development involves considering a variety of plausible situations that yet to occur. The four scenarios described here have positive and negative dimensions. They contain surprises and familiar aspects as well as extreme and middle-of-the-road aspects. There is no worst-case or best-case future. Nor is the future a linear continuation of the present. The scenarios are plausible futures that current developments could lead to.

In light of DEN's mission to support the cultural sector to maximise the opportunities that the digital transformation presents, the scenarios have been drawn up based on two questions:

- How does the audience of the future define culture and how do they participate in culture in the medium term (five years) and the long term (15 years)?
- What is the role of the digital transformation in this respect?

The output of three interactive sessions with 29 experts from various disciplines formed the basis for the scenarios. For more information about this process, please refer to Appendices I and II.

Scenario axes

We developed the scenarios along two axes. These two axes are the key drivers and uncertainties that are likely to determine the future. In crafting the stories, or narratives, reference has also been made to other influential trends and developments, as identified in the expert sessions.

Axis 1 - Degree of diversity: cohesion versus fragmentation
The theme of diversity has been chosen because of its prominence today, the expectation that it will remain high on the agenda in the years to come, and its potential as a driver for change. Recent trends suggest a tendency towards increasing diversity in background, experience, expression and needs, but in which direction these trends will advance remains to be seen. Will the landscape become more diverse and more cohesive? Or more diverse and fragmented?

Cohesion: inclusion of rich and poor, young and old, culture, background, faith, people with disabilities; room for subcultures, fragmentation of traditional art forms, crossovers; harmony.

Fragmentation: individualisation, 'hermitting', conflict and polarisation, disintegration; competition between regions, focus on local values, nationalism, localism, even more smaller niches, more diversity in cultural expression.

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

[According to Wikipedia](), Generation Z, or Gen Z for short, is the demographic cohort succeeding the Millennials (Generation Y). The precise age boundaries of Generation Z are not fixed, but most descriptions seem to agree that the term represents people born from 1995 to 2010. Since members of Gen Z have been exposed to the Internet, technology and social media from earliest youth, they are also sometimes dubbed Generation I or Gen I.

We opted for Gen Z because they are the first generation to spend their formative years interacting with and communicating through digital technology. This has a big influence on the way in which this generation experiences and practises culture, what type of culture and entertainment they enjoy, and how they form networks. It is not yet clear whether they will be passive consumers of culture or have a leading role as active members.

Active: the new generation is vocal; surprising, confrontational, focus on entertainment; fear among other generations for cultural impoverishment; nostalgia.

Passive: PR machines, consumerism. Public authorities and institutions have a large and active role in the cultural landscape.

Scenarios structure

The scenarios explore multiple, alternative narratives about the future. They possess internal logic, using the past and present as starting points. This means they are plausible alternative futures that could reasonably occur. The scenarios illuminate different futures, complete with negative and positive dimensions – they do not represent a desired future. To show how we arrived at a specific future, each scenario starts with a description of the baseline situation.

Given the impact of COVID-19 restrictions on the cultural sector, the question how we emerge from the coronavirus crisis plays an important role in the earlier years of the scenarios. Each scenario is resilient in its own way. In the longer term, the impact of the pandemic is less visible and other developments will be more significant. The scenarios can therefore be seen in isolation from the coronavirus crisis, meaning they have value irrespective of the short-term or long-term consequences of the pandemic.

The scenarios focus on the following elements:
- The degree of trust in authority and the role of traditional institutions.
- The concept of culture and the social relevance of culture.
- The place and perception of culture in our society.
- Revenue models.
- Economic structure.
- The role of EU and the mobility of people and things (e.g. museum materials, exhibitions, contemporary art).
- Data and privacy legislation.

The four scenarios

Baseline:	Prolonged economic depression, severe decline in tourism, drastic funding cuts (arts considered a leisure activity)
Degree of diversity:	Cohesion, with Gen Z as driving force (focus on inclusiveness, accessibility, participation, experience and creative expression, innovation)
Cultural driving forces:	Gen Z, the new programme creators, lead the way and connect
Social relevance:	Culture as an experience, a means to connect with the familiar and to provoke, cross-pollination; preservation of culture: cultural institutions, cultural heritage, 'culture of national importance'
Place of culture:	Close to people on (super) platforms, in schools, neighbourhoods, community centres, international networks
Revenue models:	Innovation, low budget, large reach, accessibility: everyone participates, international reach, co-creation
Type of economy:	Transformative, value driven, 'egalitarian', participatory
Role of Europe:	Fragmented, weak
Data and privacy legislation:	Privacy is a basic right worth fighting for

Baseline:	Two-year ban on events, young people affected the most
Degree of diversity:	Fragmentation – between generations, social groups; regional competition
Cultural driving forces:	Gen Z, influencers (in cooperation with the scientific community and, in particular, European and regional governments
Social relevance:	Culture as entertainment, shaping and reinforcing of identities, cross-pollination, regional profiling
Place of culture:	European networks, regions become more interesting culturally
Revenue models:	Large happenings – first ads on YouTube, sponsoring by big companies, sale of data, pop-up experiments with offline-online combinations
Type of economy:	Transformative, value driven, more sustainable
Role of Europe:	Cooperation at EU level
Data and privacy legislation:	Level of privacy varies per individual (from privacy seen as a luxury commodity to indifference to privacy rights)

Inclusion ——————————————————— **Fragmentation**

Baseline:	Underfunding of the cultural sector, weakening of cultural life, concerns about vulnerable neighbourhoods
Degree of diversity:	Cohesion (however, Gen Z is difficult to reach)
Cultural driving forces:	National government, mayors, economic boards, educational institutions and other administrative networks; influencers and other artistic heroes, sponsored by large tech companies and sportswear brands
Social relevance:	Culture as a vehicle for connection, encounters, cross-pollination; thematic programming (by EU, national government, municipalities): 'The Year of…'
Place of culture:	On a national scale, in major cities, culture in neighbourhoods, via platforms and festivals
Revenue models:	Blockbusters, VR technology, gaming, layered multimedia campaigns, excellence programmes
Type of economy:	Geared toward recovery, search for alternative carriers, cooperation, sustainability
Role of Europe:	Fragmented, funding of art as a vehicle for connection
Data and privacy legislation:	Data generate money, privacy is optional

Baseline:	Almost all layers of society have been affected by the economic crisis, people are worried about the future
Degree of diversity:	Fragmentation – between generations, social groups; regional competition, cultural bubbles (some of which inclusive)
Cultural driving forces:	Local councils and social sectors supported by economic boards
Social relevance:	Culture as a vehicle for quality of life, solidarity, economic development
Place of culture:	Diverse offering, but hardly any cross-pollination and crossovers; in the periphery (small towns and villages), districts and regions
Revenue models:	Regional profiling (economic and otherwise), attractive business climate (local sponsoring), tourism
Type of economy:	Geared toward recovery, search for alternative carriers, cooperation, sustainability
Role of Europe:	Cooperation through EU programmes and town-twinning schemes
Data and privacy legislation:	Privacy as a fundamental human right

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

Baseline: Prolonged economic depression, severe decline in tourism, drastic funding cuts (arts considered a leisure activity)

Degree of diversity: Cohesion, with Gen Z as driving force (focus on inclusiveness, accessibility, participation, experience and creative expression, innovation)

Cultural driving forces: Gen Z, the new programme creators, lead the way and connect

Social relevance: Culture as an experience, a means to connect with the familiar and to provoke, cross-pollination; preservation of culture: cultural institutions, cultural heritage, 'culture of national importance'

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

Revenue models: Innovation, low budget, large reach, accessibility: everyone participates, international reach, co-creation

Type of economy: Transformative, value driven, 'egalitarian', participatory

Role of Europe: Fragmented, weak

Data and privacy legislation: Privacy is a basic right worth fighting for

<u>Audiences of the future</u>

- *Older generations: relive old times, retrospective, some go along with new developments*
- *Younger generations: identify and seize opportunities, are vocal, have a strong need to experience and be part of cultural experiences*
- *Art as a means of creating awareness, provocation and forming opinions*
- *Craving for art and culture among young and old*
- *No clear distinction between creators and consumers*
- *High level of accessibility*

Culture as a virtual and/or physical space for creativity and experience

The turbulence of the past year has shaken society and the cultural landscape to its core. While everyone was hopeful that the recession would be short lived, we were faced with a severe global depression which has caused Europe to fragment. The cultural sector has had to reinvent itself due to sharp declines in tourism and funding for anything regarded

as 'leisure' or 'subsidised hobbies'. Trusted structures, infrastructures and initiatives were discontinued due to lack of money and ambition. Many leading and alternative theatre companies as well as regional museums were forced to close their doors – a painful experience for staff, suppliers, visitors and local residents. As a result, a thriving cultural ecosystem was lost and intended partnerships between cultural facilities aimed at strengthening their market position never got off the ground. The surviving institutions have shifted their focus to the short term with a flexible programme. The emphasis is on responding to current trends. Funding for institutions that are considered to be of national importance is still provided. In practice this means that mainly urban architecture and prestigious institutions like the Rijksmuseum, and sites such as castles and landscape heritage in the provinces, receive support.

Although many cultural bodies are no longer physically present in cultural life, a digital offering of large and small 'stories' where a diversity of voices is valued has remained available. After all, digitalisation itself is a democratic process. The settings of algorithms of video channels and social networks are deliberately designed to introduce people to subcultures and other forms of performance. These innovations have brought the cultural sector closer to the people. However, despite this, a large part of the cultural sector has disappeared from the public domain.

Eager to seize new opportunities, Gen Z has jumped in the void thus created, securing an early place at the table under the motto: 'If you're not at the table, you'll be on the menu'. Presenting themselves as the new content creators, they get decisionmakers on board. Vibrant talent hubs and design and development labs have emerged on the cutting edge of the virtual and physical world and where cultures come together. Everything is blended. Allowing audiences to be part of productions makes for exciting performances that are much discussed on social networks. With many physical venues now closed, content is being produced and shared online at an unprecedented rate. Cross-genres are emerging and evolving quickly. Creators are racking up huge numbers of hits, likes and shares with remakes of or new takes on existing productions. Digital artistic materials and digitised collections from the past are used to create new digital cultural expressions. Anyone can be an authority as long as their work is presented persuasively. There is no longer a need to spend years in education. In the physical world, entire museum collections are now housed off-site, in one central building. Curators are no longer affiliated with an institution, but form teams with other curators to organise exhibitions in which artworks from different collections are dynamically combined.

From their natural 'cultural habitat' outside traditional venues and exhibition spaces, and with the objective of 'culture as an experience', creators work on a wide variety of, mainly low-budget, projects and events. Unexpected crossovers and new distribution channels have emerged and innovative revenue models, such as estates and fundraising among tech millionaires, are the norm. Co-creation seems to be the magic word. Everybody is part of something larger. These developments are often met with surprise, if not suspicion, by those who dominated the cultural scene for many years. In their opinion, an approach in which 'real' art is mixed and overshadowed by what seems to be thrown together and superficial cannot be anything other than fleeting.

Gen Z succeeds in bringing art and culture to the people – both online, via digital (super) platforms with global reach, and offline, in neighbourhoods, schools and community centres. Artists with and without a formal education co-create a continuously changing range of 'experience spaces'. In these spaces designed for social sharing, visitors can immerse themselves in bygone times and 'cultures', unattainable places, and alternative, surprising and sometimes confrontational worlds. Here, young people can create their own content and older people can relive old times. Some of these 'made-for-Instagram' exhibits are regarded as vulgar entertainment by the traditional art world. At the same time, the inclusion of different cultures and the shedding of the past with all its crudities and imperfections are prominent themes which are deliberately used by the new art generation as a means of provocation. Art and creative expressions spark penetrating conversations about social issues. Productions on themes such as hybrid identities, cyborgs, binary personalities, and the mixing of generations and the fusion of worlds encourage people to reflect on their own views.

People crave art and culture more than ever, but at the same time critical questions about data protection and privacy are being asked. What is allowed and what isn't? Culture makers experiment with artificial intelligence to initiate a conversation about what it means to be human in a robotised society (who are 'we'?). Although the rise of Gen Z was initially viewed with suspicion and scepticism, many members of older generations eventually see their added value. After all, embracing the new makes it possible to continue to cherish the familiar and the traditions they care about. They have exerted pressure to ensure that citizens are in a better position as far as their fundamental right to data protection is concerned. This has enabled Gen Z to reach a new audience that is also willing to pay for digital arts. There seems to be some truth to the notion that money buys commitment.

People of all origins and cultural backgrounds, from cities or rural areas, rich or poor, young or old – everyone has access to art and creative expression. Tailored offerings, differential pricing and focused efforts to reach a diverse audience are important incentives in this respect. Without formally expressing it, Gen Z focuses on the entire cultural infrastructure: from online learning communities, talent and genre development, to high-quality experiences with national and international reach.

Scenario 2: Gen Z as active culture designers, diversity has led to fragmentation (top right)

Baseline:	Two-year ban on events, young people affected the most
Degree of diversity:	Fragmentation – between generations, social groups; regional competition
Cultural driving forces:	Gen Z, influencers (in cooperation with the scientific community and, in particular, European and regional governments
Social relevance:	Culture as entertainment, shaping and reinforcing of identities, cross-pollination, regional profiling
Place of culture:	European networks, regions become more interesting culturally
Revenue models:	Large happenings – first ads on YouTube, sponsoring by big companies, sale of data, pop-up experiments with offline-online combinations
Type of economy:	Transformative, value driven, more sustainable
Role of Europe:	Cooperation at EU level
Data and privacy legislation:	Level of privacy varies per individual (from privacy seen as a luxury commodity to indifference to privacy rights)

<u>*Audiences of the future*</u>
- *Older generations: resistance to change and fear of cultural decline; some members of this generation see the added value of 'new culture' and remain enthusiastic consumers of culture*
- *Younger generations: promote Gen Z identity, experience based, active in the international community, resistance to 'old culture'*
- *Art as the answer to major social problems, critical of society, accountability*
- *Audience is fragmented ('old art' versus 'new art'), friction between communities with different identities. Communities consist of active, indirect makers with their own channels who influence the artists they follow.*

Culture with 'Gen Z signature'
The changes in society due to migration, the ageing population and the long economic slump has put solidarity between young people to the test and intensified the

fragmentation that already existed between generations. The arrival of the coronavirus only added to this. Young people in particular were affected by the stringent measures put in place to fight COVID-19, even though they are far less experiencing the health effects associated with the disease. Live festivals and events were banned for two years. However, young people were still able to virtually attend shows of artists and gaming events, such as Fortnite tournaments, via live streams. After the restrictions were eased, they started gathering in the open air, at forts, bunkers, dolmens and historical buildings.

What started as social gatherings and parties have evolved into popular happenings attracting hordes of local followers. More and more artists have joined the movement, from graffiti artists, musicians and dancers to light artists and sculptors. And with them, their online followers on social media. These followers are also actively involved in the movement through the sharing of fan art and fan fiction (e.g. their own cartoons and stories) and through engaging in conversations within their communities. They, in turn, influence the artists, blurring the lines between creators and consumers.

Young people see plenty of opportunities for doing great things and showing the rest of the country what is happening in their town or region. As the events grew in size and popularity, local councils started to take part in discussions and companies jumped on the bandwagon as sponsors. AI and VR companies are eager to show that they are involved at the grassroots level where the action is. Organisers of art projects and experiences make use of their equipment and software to show what is possible. Affiliated companies are making a lot of money from all the data generated, although they are hesitant to advertise that fact. Some people are aware that these big tech companies, or 'data grabbers', are contributing to the fragmentation of society through personalised information, knowledge and entertainment experiences. In some communities, these kinds of initiatives have therefore been banned to protect subcultures that place great value on privacy and discretion. There are also places that are less stringent when it comes to privacy protection. Poverty in vulnerable neighbourhoods has increased. Efforts from local councils to generate new initiatives have been unsuccessful because a solid foundation of innovative initiators is lacking.

All expressions must bear Gen Z's signature. Frankly, Gen Z finds it amusing that Millennials and even older generations are so concerned about this. Older people feel art has become vulgar entertainment and has degenerated into a medium driven by the principle 'money buys an audience'. Many find it disturbing that anyone can determine

what quality is. They fear that independent artists and institutions will end up being sacrificed for commerce. Many new initiatives and artistic expressions are viewed with vigilance. How is it possible to run a traditional or digital museum without a professionally trained curator? Stories are presented without any form of traditional context, which is what you get when everyone can throw in their two cents. At the same time, however, the initiatives attract large numbers of visitors, albeit that many stay at home, chatting with their friends who are also at home or watching videos of other people gaming at some event.

There are also Gen Z culture makers who are proposing a different approach. Not disposable art that is created, consumed and forgotten, but sustainable art as a tool for awareness, dialogue, understanding or even solving major problems in society. Sustainable art can provide new perspectives and possible solutions to persistent challenges such as climate change, poverty and plastic waste. Sustainable artists are setting up new social movements around wicked problems in which art, science, business and the government join forces at national and international levels. This is mostly done through a combination of making locations available, funding artists to drive change, involving education and designing layered online and offline media strategies. Communicating and collaborating online is second nature for Gen Z, which makes it easy for talented individuals from abroad to join the movement. This has resulted in an international community known as The World is Our Stage (TWOS). Young people know each other, even without ever having met in person. A climate of cross-pollination has been created in which all kinds of international and local niches and initiatives are emerging. New communities are being formed, sometimes in surprising places – online, offline or a mix of both – and they are having an unexpected impact.

Most communities have strong identities and distance themselves from people who are different. For instance, younger generations are attacking 'old culture' and questioning the way our economy and society operate. Questions at the heart of the debate are: Who determines what culture is? What is the value of cultural expressions? This has caused the cultural sector and its audience to become fragmented, with one part developing alongside Gen Z, and another part being guardians of heritage, representing 'what was' and culture 'as it used to be'. Museums and film and theatre companies are constantly being asked to explain themselves to their audiences and have to account for the decisions they make.

Sustainability is key, in everything Gen Z does. Sustainable power generation, sustainable food, reduction of packaging and waste, recycled art, reuse of vintage clothing. It is simply common sense. Gen Z has taken it to the next level and is showing the rest of the world how it is done. Many people look up to influencers, many of whom have become very wealthy. But on the other hand, people are aware that the economy is about more than just money. It is also about leveraging partnerships within your own community. That experience and its value cannot be expressed in terms of money.

Scenario 3: Gen Z as passive culture designers, diversity has led to fragmentation (bottom right)

Baseline:	Almost all layers of society have been affected by the economic crisis, people are worried about the future
Degree of diversity:	Fragmentation – between generations, social groups; regional competition, cultural bubbles (some of which inclusive)
Cultural driving forces:	Local councils and social sectors supported by economic boards
Social relevance:	Culture as a vehicle for quality of life, solidarity, economic development
Place of culture:	Diverse offering, but hardly any cross-pollination and crossovers; in the periphery (small towns and villages), districts and regions
Revenue models:	Regional profiling (economic and otherwise), attractive business climate (local sponsoring), tourism
Type of economy:	Geared toward recovery, search for alternative carriers, cooperation, sustainability
Role of Europe:	Cooperation through EU programmes and town-twinning schemes
Data and privacy legislation:	Privacy as a fundamental human right

Audiences of the future

- *Older generations: concerned about change, but pleased with on-demand options to consume culture from home*
- *Younger generations: reluctant to take responsibility, culturally active although not very visibly*
- *Art as a means of exploration and self-expression*
- *Various niches (including 'old' generation, non-Western), but few crossovers (fragmentation)*
- *Culture consumers live in homogeneous bubbles of like-minded people, communication is passive with occasional emoticons or selfies as form of social interaction*
- *Intimacy in relationships between artists and the public is mutually enriching*

Culture in small groups

The day we took to the streets, protesting shoulder to shoulder in cities across the country to demand an end to systemic racism is branded in our collective memories. However, despite the sense of unity, friendship and the efforts made to curb inequality in all layers of society (education, the labour market, housing market, justice system, law and enforcement, public debate), this has not led to social cohesion. Yes, statues and other reminders of our colonial history have disappeared from our streets and we are much more aware of power structures in our society and how some people, knowingly or unknowingly, benefit from them. And that these structures not only affect people whose roots lie outside this country but others as well, such as the mentally or physically disabled, the poorly educated, people in disadvantaged neighbourhoods and the LGBTI community.

The economic crisis that has affected all layers of society. The fear of change, the loss of jobs and our worries about the future proved to be stronger than the desire to connect with one another. This has resulted in a fragmented society and a longing for the familiar. Cultural genres that were previously especially popular among baby boomers, such as opera and classical music, jazz and rock, are still popular, albeit at much smaller scale in shrinking niches, but increasingly at home. With fan bases dwindling in size, theatres and other venues were forced to close their doors and have moved to YouTube and other channels, such as platforms of public service broadcasters. As a result, older people and those who prefer to stay indoors can experience culture of their choice, where and whenever they want. Although cultural offerings have been enriched with 'new', non-Western culture, crossovers only exist to a limited extent and the various genres are not very successful at connecting the different groups within society. The cultural sector is merely a small group in an increasingly diverse society. Attempts at building bridges lead to verbal attacks on each other's identities and views. Culture makers have to tread carefully to make sure they don't offend non-dominant identities with their work. This has even led to censorship in some places.

Young people are consciously engaged in culture, although under the radar. It seems like almost everyone is busy creating something. It is a need that comes from within, enabling people to discover and affirm their identities. However, their role is perceived as passive by the older generations. Young people themselves are reluctant to take responsibility. It is very difficult to get it right these days, especially with everyone being so critical about everything. The process of creating is mostly done online, or creations are only shown to a selected few. Life is mainly about having a laugh. Superficial fun, the cornier the better.

The pandemic has boosted digital platforms and remote working. Technology has virtually eliminated the need to be physically present or live in urban settings. House hunters prefer a quieter life, with small towns and villages most in demand. Some regions are benefiting from this trend. Culture is regarded as a vehicle to improve quality of life and solidarity in neighbourhoods, municipalities and regions. Local authorities and social sectors are collaborating closely with each other, supported by economic boards. European programmes and town-twinning schemes also offer great opportunities. Because local authorities and social sectors have access to data of consumers and residents, they can respond effectively to people's cultural needs. At the regional level, every community – from gamers, dance crowds and cosplayers to nature lovers – has their own concept of culture. Cultural programmers representing institutions with a diverse range of cultural events and initiatives are having to adapt like chameleons in order to appeal to all the different target groups. Some regions succeed in developing cultural offerings, which reflect their region's identity, individuality and narratives, while integrating regional themes such as sustainable energy and food. Next to pleasant places to live, these regions are popular tourist destinations and attractive locations for businesses. Other regions are experiencing cultural impoverishment. In these regions in particular, various Support-Your-Local initiatives are being set up. Because of their local focus, cultural entrepreneurs are missing out on opportunities to market their products and services nationally and internationally.

Most young people are not interested in these regional initiatives. Supra-national ideals don't mean anything to them either. Like other groups in society, they prefer to stay in their familiar bubble and interact online or offline with like-minded peers on social networks, in their neighbourhoods, at school or work, or during living room concerts and micro-happenings with close friends. Intimacy is an important part of how they experience culture and creative expressions.

Scenario 4: Gen Z as passive culture designers, diversity has led to cohesion (bottom left)

Baseline:	Underfunding of the cultural sector, weakening of cultural life, concerns about vulnerable neighbourhoods
Degree of diversity:	Cohesion (however, Gen Z is difficult to reach)
Cultural driving forces:	National government, mayors, economic boards, educational institutions and other administrative networks; influencers and other artistic heroes, sponsored by large tech companies and sportswear brands
Social relevance:	Culture as a vehicle for connection, encounters, cross-pollination; thematic programming (by EU, national government, municipalities): 'The Year of…'
Place of culture:	On a national scale, in major cities, culture in neighbourhoods, via platforms and festivals
Revenue models:	Blockbusters, VR technology, gaming, layered multimedia campaigns, excellence programmes
Type of economy:	Geared toward recovery, search for alternative carriers, cooperation, sustainability
Role of Europe:	Fragmented, funding of art as a vehicle for connection
Data and privacy legislation:	Data generate money, privacy is optional

Audiences of the future
- *Older generations: want to connect with others, shared identity*
- *Younger generations: difficult to reach, disengaged, fragmented groups that are either passive, pragmatic or activistic*
- *Driven by social justice, larger narratives*
- *Art as an instrument for reinforcing (national) identity and as a unifier in society*
- *Very accessible, cheering, celebrating*
- *Audience communicates inclusive story*

Culture as a means of strengthening identity and social cohesion

It felt strange to walk along empty streets, normally crowded with tourists from all over the world. For several years, tourists stayed away and there was no point in organising large exhibitions and events. Funding was also a problem. Sponsors backed out of deals and public authorities had to dig deep into their pockets to fuel economic recovery. There were concerns about vulnerable areas slipping into further decline.

Council leaders, economic development boards, educational institutions and local authority networks joined forces, not only to rejuvenate the economy but also to regenerate cultural life. A national theme was introduced. The first events were held digitally, for instance using 360° panoramas of heritage sites and stories as a connective force. Later, open-air events were also organised whilst observing social distancing measures. The aim: to connect and to touch people with culture. Community workers were used to uncover hidden gems and to establish connections between music, dance, visual art and performance art. Gradually things started to brighten up. Cultural life picked up speed again. Culture, professional art as well as amateur art, is regarded by public authorities as a powerful instrument to reinforce collective identity and to create social cohesion. A large proportion of national funding is allocated to cultural high-flyers and excellence programmes. What remains goes towards the improvement of the residential and living environment.

Large events which were commonplace before the coronavirus outbreak are back on the calendar. Even more so than before, the focus is on events that attract large numbers of people, blockbusters that generate massive returns. Individual artists who have successfully defined themselves as a brand are welcomed by local councils and form an integral part of city marketing strategies and initiatives. Merchandise is an important source of income for both cultural institutions and artists. In times of uncertainty, this success formula has proved to be the most effective for fundraising and publicity. Digital technology is being used to create slick programmes, high-quality streaming platforms and much-talked-about events and to attract a wide audience, especially online. Productions that used to be almost exclusively offline are tapping into the giant potential offered by a solid online presence to feed the hype surrounding their exhibition or event. Experience has shown that this boosts profits.

Europe is making funding programmes available to top museums that work together in order to bring the great European story to the people. One of the reasons why these museums are so successful is that they have switched to hybrid business models that

make the physical experience work alongside a digital one. The museums are also creating a canon of European history, intended to serve as a resource and source of inspiration for schools across Europe. Exchange programmes are once again being developed, now mainly to activate Gen Z and to stimulate their interest in the European story.

Unlike before, the focus is much more on attracting a diverse audience – not out of a sense of obligation, but rather a shared sense of social justice. In many more communities traditional institutions such as libraries and museums have become cultural meeting places. The fact that they generate extra revenue is, of course, a welcome bonus. Grassroots movements speak out on the importance of justice and have gained broad support from various groups in society. Entrepreneurs and businesses have greened up their business practices. Both public and private financers judge programme makers on their ability to reach all groups in society including people with disabilities in the widest sense of the word. Training for digital literacy is provided through neighbourhood teams.

There is a special focus on citizens who have been in this country for generations, but until now have barely been included in cultural programming: communities with roots in the former colonies, as well as more recent arrivals from Africa and the Middle East. After all, these cultures have a unique perspective on the history of this country as well as on its present situation and its future. Artists from these communities are given a prominent role and their work forms part of the larger narrative. More and more cultures are starting to blend together. The main sponsors (tech giants and sportswear brands) know better than anyone else that society is becoming more and more diverse. This is reflected in the multimedia campaigns that are launched by these companies, featuring top-of-the-league influencers, musicians and other artistic heroes. The data from these campaigns generate a deep understanding of their target groups. Consumers and cultural audiences are offered real value in return for access to their data. As a result, nobody seems to care about privacy.

Although culture is meant to bring people together, many young people are still difficult to reach. They have little interest in the culture that is imposed on them and because they are approached as a cohort rather than individually, they do not feel spoken to. To them, cultural expressions are conservative, populist and nostalgic. They are not interested in yet another VR Van Gogh exhibition, even if gaming elements are added to the content.

Instead, they connect and find meaning through online games and social media channels. Some are pragmatic and practical ('if the government sees art as an instrument, then let's go along with it'). They participate in what they consider to be 'nostalgic productions', but really find room for expression in their own world. Others are more activistic and rebel against the cultural straight jacket they feel they are being forced into. Inspired by punk bands of the 1970s that resonate with them on a deep level, they start to rebel by spray painting national symbols such as the Rijksmuseum and by occupying government buildings.

Future challenges and opportunities, and possible solutions

What can be learned from the scenarios? What are key challenges and opportunities for the cultural sector? In this section, we start by listing the most important transformations in the cultural sector. We will then describe the transformations per scenario to gain insight into the bandwidth of the possible developments. Finally, we will discuss the perspectives for action for each of the four scenarios.

Key transformations

- *Transformation of the concept of culture*: It is clear that the concept of culture is changing. Audiences and creators are slowly beginning to define art and culture differently. New online and offline experiences are bringing something new to the familiar concept of art.
- *Transformation of the cultural landscape*: The transformation of the concept of culture has implications for institutions, artists and other stakeholders in the cultural landscape.
- *Transformation of culture makers and audiences*: With roles and patterns changing, the relationship between creators of art and their audiences takes on a new dynamic.
- *Transformation of revenue models*: The above provides opportunities for, among other things, new revenue models.

Transformations per scenario

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

Transformation of the concept of culture

Art and culture are defined very broadly and loosely. The key focus is on entertainment. Society is very open to all kinds of hybrid forms of art and entertainment, and much is produced and shared online. As a result, developments take place in rapid succession. Quality is whatever the audience says it is. Traditional criteria no longer apply.

Transformation of the cultural landscape

Power structures and hierarchy have been abandoned. Creators, the public and cultural institutions are exposed to each other's ideas through cross-pollination. The cultural functions of libraries and other meeting places are further developed. The extent of cooperation when it comes to the sharing of collections and archival materials is virtually limitless.

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

The public is part of the creation process, both online and off. Online communities, such as fans of genres, have a substantial amount of influence. Online offerings enable people to determine what they want to see and experience. Culture makers tap into this trend.

Art is a source of narratives that help shape the future. The voice of non-Western cultures is used to build an inclusive narrative and society. Visual images are disseminated rapidly via digital media and find their way into the public discourse.

Generations merge into one another, in particular when it comes to understanding each other's beliefs and thoughts. As a result, culture makers and the public come closer together.

Transformation of revenue models

Local governments invest in spaces and staff to support culture makers. This is done in accordance with the commons-based revenue model, in which governments and stakeholders work together with citizens without the need for financial compensation to create meaningful projects that move social issues in a specific direction.

Subsidy providers in the traditional sense no longer exist. As a result, traditional cultural offerings disappear. Culture makers who develop intense, online and offline relationships with the public do succeed in securing various sources of funding, such as commons-based funding, subscriptions and funding through private sponsors and donors.

Scenario 2: Gen Z as active culture designers, diversity has led to fragmentation (top right)

Transformation of the concept of culture

The concept of culture is transforming in a profound way. Many people see culture as a form of entertainment. Questions at the heart of the debate are: Who determines what culture is? What is the value of cultural expressions? Can anyone determine what quality is? Is it OK for art to be driven by big bucks and the principle of 'money buys an audience'?

Transformation of the cultural landscape

The debate about what is culture is has caused the cultural sector and audience to become increasingly fragmented. Culture makers, the public and cultural institutions do find common ground when it comes to wicked problems. To tackle these problems, the cultural sector, science and government join forces. New forms of collaboration are developed, especially online and outside national borders. Big tech companies have gained a firm foothold in the cultural landscape.

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

The cultural landscape is characterised by innovation and a blend of online and offline expressions, such as the streaming of offline events and AI and VR experiences. People are both creators and consumers of culture. The public and some culture makers are involved in these new developments. Others become guardians of heritage, representing what culture 'used to be'. There are signs of increasing distance between generations and groups in society. Communities emerge in which shared beliefs are reinforced, distancing themselves from people with different identities and beliefs.

Transformation of revenue models

New, large happenings are made possible by big tech companies that earn a great deal of money from all the data generated by these events. The traditional subsidy model for the arts is abandoned. Local councils still support initiatives to address poverty in vulnerable neighbourhoods, but these initiatives are not very successful. The national government is very low profile. Public-private partnerships are formed to tackle major social issues.

Scenario 3: Gen Z as passive culture designers, diversity has led to fragmentation (bottom right)

Transformation of the concept of culture

The cultural era has come to an end. New generations consume culture mainly from their homes, either alone (online) or with friends (online and offline). The government has not managed to adapt and carry culture into the new age. Many people experience sadness and a sense of loss.

Transformation of the cultural landscape

Micro-communities, small cultural villages and mini compartments of culture are shooting up everywhere. Various venues and institutions have had to close their doors due to reduced numbers of visitors. Culture is positioned as a means to raise awareness for and to solve social issues.

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

Artists are 'intimately idealistic'. They pay attention to detail and are devoted and more committed than ever. Small, local and understandable expressions are used to address larger social issues. Local initiatives create ripple effects throughout the local and global community. Lovers of subgenres and niches find each other both online and offline, and show a genuine interest in what creators around them are doing. People find their identities in these micro-communities and feel proud to be part of. Others feel they don't belong in this culturally fragmented world and vent their frustrations online.

Cultural institutions have an open attitude toward these small collectives, and some are organised more professionally than others. This requires institutions to adopt a flexible and tailored approach, which is very time consuming.

Transformation of revenue models

Although most conventional art is accessible, it is no longer as attractive from a financial investment point of view. Other art forms are limited to applied art and design, which is reflected in educational programmes. The role of the creative sector is to contribute to finding solutions to social problems. Designers, architects and visual artists also craft brand identities for companies, both on- and offline.

Scenario 4: Gen Z as passive culture designers, diversity has led to cohesion (bottom left)

Transformation of the concept of culture

Public authorities use culture as a means of reinforcing collective identity and creating social cohesion, mainly through larger narratives. There is a shared sense of social justice.

Transformation of the cultural landscape

Top museums and cultural high-flyers are thriving. Alternative culture and art forms are struggling. A high level of attention for different cultures now forms an important part of the larger narrative. The cultural sector is actively collaborating with local councils, economic boards, educational institutions and other networks to create connections and touch people's lives. Amateur art is alive and kicking.

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

Artists work from a shared sense of social justice. Whether they contribute to large blockbusters or grassroots initiatives, their goal is to be accessible to different groups within society. Digital technology is used to create slick programmes to attract a wide audience, both on- and offline.

However, the artists' stories don't resonate with the younger generation. Many young people listen to their stories and occasionally draw inspiration from them, but mainly connect with peers and express themselves through online games and social media channels.

Transformation of revenue models

Government funding is mainly provided to cultural high-flyers, excellence programmes and blockbusters that generate massive returns. Cultural institutions and artists that don't directly benefit from these sources of funding benefit indirectly from the spillover effect of marketing initiatives and merchandising. Amateur art is thriving. Surprising, innovative and even financially successful programmes and projects are emerging from the talent pool of amateur artists.

Appendix I

Development of the scenarios

The earlier-mentioned questions served as the basis for dialogue between participants in the sessions where opinions were shared, insights gained and new views emerged.

The scenarios were developed in a participatory way with DEN's network, with various professionals contributing their knowledge and expertise to the scenario development process. Some participants contributed to multiple or even all of the steps. Others contributed to a specific part of the process. For a list of all participants, please see Appendix II.

The scenario development process was facilitated by Susan van 't Klooster and Freija van Duijne. They were responsible for designing the dialogue sessions and hosting them together with DEN director Maaike Verberk and Margo de Groot-Coenen, who works for DEN on a freelance basis. Various DEN staff members provided support with preparation and reporting activities.

The process included the following steps:
1. Trend survey
    o What are the most significant trends that will shape the cultural sector in the coming years? (PESTELD: Political, Economic, Social, Technological, Environmental, Legal and Demographic factors.)
2. Trend workshop
    o What are major trends with a big impact? What are the uncertainties (ranked by importance) surrounding those trends?
    o Identification of emerging issues (issues that have not been influential in the past, but that might be in the future).
    o Development of insights on the digitisation of experience.
3. Development of scenarios
    o Selection of axes, constants, themes.
    o Initial version of scenarios.
4. Scenario workshop (update story lines)
    o Future oriented, visualisation.
    o Concrete examples.

o   Actors' spheres of influence.

5.   Implications and possible solutions

    o   Discussion of scenarios.

    o   Testing of possible solutions from one scenario against other scenarios.

    o   Possible follow-up steps.

6.   Reports

Concept of culture

This scenario development process focused on the cultural audiences of the future. What do they consider culture to be? How does this audience participate in culture? And how is this different from our current concept of culture? In the 2019-2020 Work Plan for Culture, the Council for Culture describes the distinctive property of culture as

> *'The aesthetic value of the arts and the intrinsic value of heritage. These values are developed when we connect to art or cultural heritage on a mental level. In the arts, this happens when the aesthetic qualities of an artwork speak to a reader, listener or spectator. In this way, art can move us or allow us to experience beauty or think about its meaning. Art can also be confrontational or shocking, lead to discussion or cause feelings of loathing or sadness. Heritage includes material and immaterial cultural property which connect people to their history, traditions and stories, or those of others. No other aspect of our society – sports, the economy, science, religion – appeals to these values so explicitly.'*

This perspective forms an interesting starting point for exploring, how the cultural audience might evolve in the future and what effect the digital transformation could have on this process.

In this process, we explored the concept of culture, a concept that we believe is already changing. What if art and culture as we know it will cease to exist and take on a new meaning in our society? Confronted with the changing reality of the cultural landscape, can we imagine a different concept of culture and a different cultural experience? What influence does the increasing digitalisation of our society have in terms of how we experience culture? And what does that mean? We hope that these scenarios will be useful in creating a constructive dialogue about these questions and be a catalyst for considering new opportunities for the cultural sector, cultural organisations, cultural professionals and the public.

Appendix II: Participants in survey and expert sessions

Name	Organisation	Position
Alex Alexiev	University of Amsterdam	Lecturer in Strategic Entrepreneurship and Innovation
Andries van den Broek	The Netherlands Institute for Social Research (SCP)	Senior Academic staff member
Angelique Spaninks	MU Hybrid Art House	Director
Anna Bilker	Cultuur+Ondernemen	Funding Programme Manager
Araf Ahmadali	City of Amsterdam, Arts and Culture Office	Senior Cultural Policy Adviser
Bert van Loon	Entrepreneur	Independent Strategist
Brigitte Jansen	Het Nieuwe Instituut	Programme Manager Design and Digital Culture Network Archives
Chantal Keijspers	Utrecht City Archives and the Flevoland Archives	Director
Christoph Jedan	University of Groningen	Professor of Ethics and Comparative Philosophy of Religion
Corina Maduro	STRP	Marketing and Communications Manager
Dick Rempt	CoCoPallet International	Managing Director
Elsbeth Kwant	National Library of the Netherlands	Strategic Adviser
Emanuella Watson-Gandy	CWG, London	Legal Consultant (Copyright and Licensing)
Erik Saaman	National Archives of the Netherlands	Strategic Adviser
Ferry van Dijk	FVD Consulting Ltd	Executive Director
Gerdien Verschoor	Camp Westerbork Memorial Centre	Director
Hans van der Linden	Flemish Authorities Department of Culture, Youth and Media	Policy Adviser
Harry Verwayen	Europeana	Executive Director
Janine Dijkmeijer	CASC	Founder
Johan Oomen	The Netherlands Institute for Sound and Vision	Head of Research and Heritage Services
Jon Heemsbergen	Art-up	Director
José van Dijck	Utrecht University	Professor of Media and Digital Society
Liesbet van Zoonen	CLICK.nl, Erasmus University Rotterdam	Professor of Sociology and Dean
Maartje Goedhart	Boekmanstichting	Researcher
Maartje Stols-Witlox	University of Amsterdam	Associate Professor Paintings Conservation
Marc Wingems	Heritage Gelderland	Director
Marcus Cohen	DEN	Senior Adviser
Marieke van der Kruijs	SIDN Fund	Project Coordinator
Mirjam Terpstra	The Dutch Association for Performing Arts (NAPK)	Director

Name	Organisation	Position
Mirthe van Merwijk	The Dutch Association of Theatres and Concert Halls (VSCD)	Coordinator
Nick Teunissen	Platform Hero	Artistic Director
Patrick Timmermans	Heritage Brabant	Director
Pravini Baboeram	ECHO Expertise Centre for Diversity Policy	Programme Manager
Rina Knoeff	University of Groningen	Associate Professor and Historian of Science and Medicine
Sherida Zorg	Rijksmuseum	Diversity & Inclusion Manager
Wietske van den Heuvel	DEN	Senior Adviser