



an initiative of the
AMERICAN ASSOCIATION OF MUSEUMS

MUSEUMS & SOCIETY 2034: TRENDS AND POTENTIAL FUTURES

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“The goal of forecasting is not to predict the future but to tell you what you need to know to take meaningful action in the present.”

— Paul Saffo, futurist

Oracle bones, Ouija boards, Tarot, crystal balls, tea leaves, Magic 8-Balls—humanity has always been obsessed with predicting the future. The unknown scares the pants off us, as well it might! Knowledge is power, and knowing what is coming around the corner would be immensely reassuring. Unfortunately, that isn't going happen. And predicting the future is not, in fact, the goal of futurism. We can't determine what will happen, but we can take a thoughtful look at what might happen, and the attendant consequences. This awareness of potential futures enables us to choose which future we most want to live in, and figure out how to bring it into being. The American Association of Museums has established the Center for the Future of Museums (CFM) to help with that task.

CFM commissioned a trends paper by Reach Advisors to kick off this discussion. The condensed version presented here introduces the major themes that will be explored in more depth in a white paper to be released in 2009. We asked Reach Advisors to be edgy and provocative, and they have obliged. Sure, we hope that things will turn out fine without our active intervention, but do you really want to take that chance? Complacency breeds complacency, and thinking about potentially dark futures is a very effective

motivator. Our hope is that this paper stimulates lively discussion, and we look forward to incorporating your input both into the forecasting and into exploring how museums might respond. Working together we can help create a healthy, stable society in which every person has the leisure and ability to enjoy what museums have to offer.



Elizabeth Merritt
Founding Director
Center for the Future of Museums

The Center for the Future of Museums (CFM) helps museums explore the cultural, political and economic challenges facing society and devise strategies to shape a better tomorrow. CFM is a think-tank and research and design lab for fostering creativity and helping museums transcend traditional boundaries to serve society in new ways. CFM is an initiative of the American Association of Museums.

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Museums are often viewed as conservators of the past, but some have always been in the business of the future—even going so far as to enshrine it in their mission statements.

But what will the future look like? How much can we really anticipate about the world of 2034?

To address those questions, Reach Advisors pored over nearly a thousand articles, data sets, interviews and discussion forums to identify the trends that are most likely to change U.S. society and museums during the next 25 years. Our quarry was the emerging structural changes that are highly likely to reshape society and highly likely to affect museums.

Of course, there will be other trends that impact the future of museums. But some of these trends might not be apparent yet; others may have a huge impact on some museums but not a broad cross-section of the field; others might have profound impacts on museums if they come to pass, but the likelihood of that happening is low. This report focuses on demographic trends, changes in the geopolitical and economic landscape, shifts in technology and communications, and the rise of new cultural expectations.

To assess how each of these trends might shape the future, we start by stepping back 25 years to 1984, to identify some of the emerging structural shifts that shape what we see today. With the full benefit of hindsight, it becomes clearer which of today's emerging trends are most likely to shape the world of 2034.

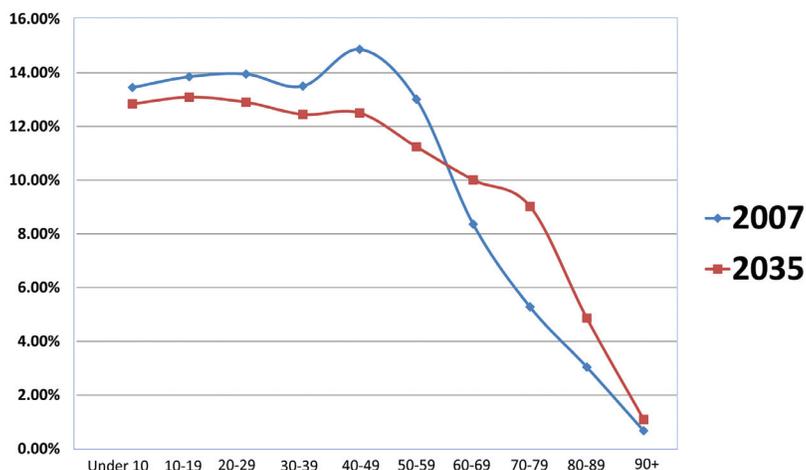
I. THE CHANGING FACE OF AMERICA

In 1984, signs of dramatic demographic and socioeconomic shifts in American society were already apparent. For the first three-quarters of the 20th century, minorities constituted 10–13% of the American population. By the early 1980s, thanks to changes in immigration laws and enforcement policies, the minority population had climbed to 20%. (Today, minorities represent 34% of the population.) At about the same time, the youngest of the Baby Boomers reached adulthood and participation rates in postsecondary education rose sharply. Each of these demographic trends will continue to shape American society by 2034.

an aging population

As the Baby Boomers age, their sheer numbers tell a story of future change in U.S. society. Today, 1 in 8 Americans are older than 65. In 2034, the ratio will jump to 1 in 5. This is a generation that has reshaped lifestyles and the U.S. consumer landscape at every stage of life. The upcoming stage will be no exception.

What this means for society: A 50% jump in the post-retirement population will require greater focus on healthcare and other services for the aging and a subsequent strain on the existing services. How will the government pay for unfunded entitlements such as Social Security and Medicare? Already, those unfunded commitments exceed the national debt, with more pressure to come on everything else that depends on federal funding. Another big unknown is how the Baby Boomers will spend their time in the traditional



Age profile of the American population, 2007 and 2035 (U.S. Census Bureau).

post-retirement years. Surveys consistently show that Boomers are far more interested than their parents in continuing some form of work after retirement—and many will do so out of necessity.

What this means for museums: How will the Baby Boom engage with museums in retirement? Can museums position themselves as employers of choice for post-career bridge jobs? Perhaps one of the most important things to consider is how museums can reinvent the role of the post-retirement volunteer, simply because this is a generation that has rarely followed in lock-step with the preceding generations. (Actually, it rebelled against them.) The Boomers constitute a large talent pool working its way towards the golden years of volunteerism, at least among those who can afford to do that.

In 2034: Exhibit labels have bigger print and museums are easier to navigate with a walker or wheelchair. Universal design is a given in even the smallest museums. Museums are at the forefront of the “brain exercise” movement, helping to maintain the cognitive powers of an older population. Museums play an important role in addressing the increased demand for all services for the aging and are an increasingly desired partner for existing senior service organizations, which are under pressure to serve a larger and more active senior population. And just as 2008 witnessed a presidential campaign that reinvented civic involvement for a new generation of young adults, museums will take the lead in reshaping civic involvement for a new generation of aging citizens.

Looking ahead a quarter century, the U.S. Census Bureau projects that the U.S. population will reach the 400 million mark, up from 300 million today. While the population will grow at a healthy clip, the growth rate of the Caucasian population is projected to grow only 4% by 2034—not 4% annually, but 4% in total. Virtually zero growth.

Instead, almost all of America’s population growth will come from minority populations. By 2034, minorities are likely to comprise just under half of the population. Four states in America have already become majority minority, with five more states projected to reach that level in the next decade.

Among America’s children, the majority will be minority within 15 years. After analyzing survey responses from 30,000 core museum visitors, Reach Advisors has identified a group that we call “Museum Advocates.” Museums are not just places that they visit on occasion, but are especially important places in their lives where they truly enjoy spending their leisure time. And what distinguishes Museum Advocates from other people? Nearly all have a distinct memory of a specific, seminal museum experience, usually between the ages of 5 and 9. The number of Caucasian 7-year-olds is projected to decline by 4% over the next 25 years. The number of blacks of the same age is projected to increase by 5%, Asians by 49%, mixed race children by 72% and Hispanics by 73%.



Changing composition of America (U.S. Census Bureau/Reach Advisors).

multi-ethnic america

One of the most striking changes in the composition of America since 1984 has been the dramatic expansion of the minority population. For most of the prior century, just 1 in 10 Americans was a minority, accelerating rapidly to 1 in 5 Americans in the early 1980s to 1 in 3 Americans today.

What this means for society: The obvious answer is that America will look very different in 2034 than it does today. Communities will need new and better ways to promote integration and develop understanding across cultures. For many parts of the country, this is more than a mere “cultural sensitivity” issue—it is socially and economically vital to sustain healthy communities given the dramatic shift in racial composition. What else does this mean? Just as 2008 saw a major expansion

of African-Americans in political power, by 2034 the U.S. Congress and other elected bodies across much of the country will be much more Hispanic.

What this means for museums: The fundamental challenge is that while the population is already one-third minority, heading towards majority minority, today only 9% of the core visitors to museums are minorities and approximately 20% of museum employees are minorities. If museums want to remain relevant to their communities, the museum audience will have to look dramatically different as well, particularly in the western and southern U.S. and in most of the larger cities across the country. If 5 to 9 is the critical age for converting children into lifelong museum-goers and advocates, how can museums attract minority children in this age range whose support they want in 2034? And are museums cultivating relationships with minorities serving as community organizers, political staffers, on local school boards (now a targeted entry point by some of the more savvy Hispanic political organizations)? It's a safe bet that a number of those individuals will be voting on local, state and federal museum funding 25 years from now.

In 2034: More museums will be places of cultural exchange in their communities; they won't have any other choice. Museums will be primary sites for civic dialogues about community interests and the policies that affect communities. They will be one of the most powerful agents in helping *all* children understand the future and ensuring they are prepared to take leadership roles in various sectors.

a new gender gap

Circa 1984, 55% of girls who completed high school enrolled in college. Today, almost 70% who complete high school enroll in college. Over that time, the trajectory of educational attainment

has remained relatively stable for men while arcing higher for women. As a result, women now outnumber men on most college campuses by a 60:40 ratio. The most stunning change is in the attainment of professional and doctoral degrees. When looking at the current holders of those degrees, men outnumber women by a 2:1 ratio. But the majority of those now graduating with professional and doctoral degrees are women.

When it comes to income, the old gender gap persists. As of 2007, women who work full time earn only 79% of their male counterparts, but this gap is closing rapidly for well-educated women. For example, the number of women earning over \$50,000 more than their spouses has doubled in the past ten years, and in most major U.S. metropolitan areas that draw an influx of college-educated employees, women in their 20s now earn 100% to 120% of what men of the same age earn.

We see no signs of this trend letting up over the next decade or two. Current national test scores show girls starting to pull away from boys academically as early as the fourth grade, starting down a long-term path towards higher educational attainment.

What this means for society: One implication of this ongoing shift is that the average age at which women marry and have children will likely continue to increase, at least among the women who earn college degrees. If that trend continues—carrying the next generation of mothers even further into careers where they are likely to outearn their male partners—then we also anticipate a dramatic shift in gender role expectations. This may prove to be one of the biggest social challenges in America over the next 25 years as this generation of women moves through college into the workforce and family life.

What this means for museums: Given that museums traditionally attract college-educated audiences, the impact of this change may be felt in a number of ways. When women hold the lead in educational attainment, will they constitute the majority of visitors? In many cities across the country, the mothers visiting with young children will be even more likely to be in their 30s and 40s, rather than their 20s—how will this affect museum programming? With more couples working full time and splitting childcare duties, who will have the time and inclination to become museum volunteers?

In 2034: Museums have developed many new strategies to attract both men and women as visitors. With educational attainment becoming a more visible tool of social mobility than ever, museums provide more opportunities than ever for girls (and boys) from less-educated families to gain exposure to topics that drive academic interest and carry them to college. As the percentage of two-income parents continues to increase, museums meet the demand for a more robust network of community support for the young children of mid-career parents. With more women serving as primary breadwinners, museums provide convenient, welcoming venues where families have rich experiences during their increasingly scarce time together. As important players in the formal and informal education system, museums work hard to meet the rising expectations that highly educated moms have for their children.

II. A SMALLER, FLATTER WORLD

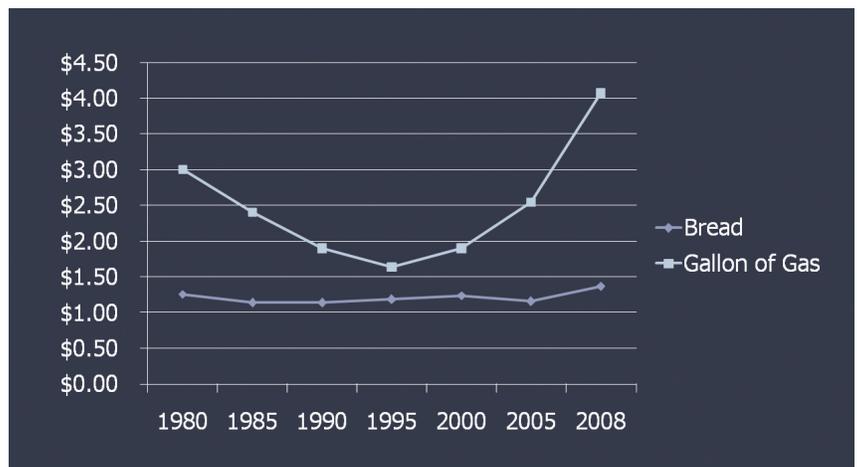


Major economic and geopolitical trends that shape the world we live in today were already evident in 1984. The United States was slowly recovering from the OPEC embargo that forced us to confront the limitations of dependence on foreign oil. It took the better part of a decade but, as a result, automotive fuel efficiency started to increase with the introduction of more fuel-efficient cars (e.g., the Ford Escort became the best-selling car in the country)—at least until fuel prices stabilized again. In related shifts, the U.S. economy experienced a period of rapid globalization and American wealth became more concentrated in the hands of its richest citizens and foreign investors.

As we look forward to 2034, these structural shifts provide clues for how the future is likely to play out in the next 25 years. Let's start with one trend that dominated most Americans' thoughts during the summer of 2008.

energy price volatility

As gasoline prices began stabilizing in the 1980s, the demand for fuel conservation eased. Sales of fuel-efficient vehicles in America were flat; the memory of the oil shocks faded, and Americans increased their consumption of larger trucks and SUVs. In the current decade, oil prices have destabilized again compared to such other staples as bread.



Bread vs. Gas (in today's dollars).

Worldwide oil consumption is projected to increase by 34% over the next 25 years. How will we plug that gap? Domestic oil production is only a small part of the answer: The largest known reserve in America, the Alaska National Wildlife Refuge, according to best-case projections can produce a total 21 billion barrels of crude oil, the equivalent of just one year of domestic consumption.

What will a gallon of gas cost in 2034? Our projection is based on conservative assumptions (i.e., a stabilized pricing environment rather than the peak prices from the summer of 2008). Extrapolating from a 25-year period of relative price stability when gas prices rose at about the same rate as the historical inflation rate, gasoline could cost \$4.91 per gallon in 2034. But if we extrapolate the price increases from just the last five years, when gas price increases far outstripped the inflation rate, then gas could cost \$25.47 per gallon in 2034. At either price, we can safely assume that consumer behaviors would change significantly.

PRICE OF GASOLINE IN 25 YEARS?

Price increase trajectory:	Avg. annual increase:	Price/gallon in 2034
Using the past 25-year price trajectory (relatively stable pricing between 11/83–11/08)	2.8%	\$4.91
Using the past 5-year price trajectory (reflects increased volatility between 11/03–11/08)	9.8%	\$25.47

What this means for society: If we reduce oil consumption significantly or see production increase dramatically, gas price increases may parallel the rate of inflation, in which case, the impact over the long term is not major. It is far more likely, however, that the volatility of the past five years will prevail, and energy costs will play a major role in how the future plays out. This will demand dramatic changes in all aspects of society, including the technology of energy production and distribution, transportation, distribution of the population between suburban and urban areas, work-at-home policies and architectural design.

What this means for museums: Volatile energy prices will have a major effect on museum operating budgets, heightening the tension between conservation and historic preservation standards and energy use. It could play a larger role in decisions about museum expansion. It will also have a major effect on consumer behavior:

- Two-thirds of car travel is currently discretionary. As energy costs rise, travel costs will become an ever more important factor in Americans' decisions about how to spend their leisure time and dollars. This effect may be buffered for local museums that are plugged into their communities. "Life list" museums that are distant but major tourist attractions will face challenges with increased gasoline prices, but not fatally as they continue to offer greater value to balance the higher costs of reaching them. Museums that require significant gasoline consumption and are not major tourist destinations will face enormous pressure.
- Home prices and sales volume in the outer suburbs and exurbs has turned down much more sharply than in close-in suburbs and urban areas, and that trend is likely to continue if gasoline prices continue to rise. Overexpansion of new housing supply in those areas created dramatic oversupply that will take the next decade to absorb, and as those prices continue to drop, they will become increasingly attractive to the growing minority population. Museums in these outer suburb and exurban locations will often find that their almost uniformly Caucasian community has turned significantly minority, due in part to confluence of the home construction bubble and the aftermath of fuel price increases.

In 2034: Museums will educate the public on how past societies coped and adapted to tectonic shifts in their resources. They will help society learn from history as we cope with a new era of more expensive energy, lower consumption, carbon constraint and climate change. Museums have uniformly adopted green design as a mark of excellence, leading by example and integrating green practices into operations. Some museums operate joint storage facilities designed to minimize energy costs while providing appropriate climate control. More museums establish satellite locations to serve outlying communities, reducing their audiences' need to travel.

the threat of recession

The current recession might prove to be a blip that doesn't impact our world in 2034—most recessions tend to run far shorter courses. But could this time be different?

As we trace back the steps leading to the current crisis, we find relaxed credit standards ... leading to overheated real estate and stock markets ... leading to increased consumer spending and debt growth ... leading to a collapse of a bubble ... leading to trillions of dollars of assets lost ... leading to a slowdown in consumer and corporate spending ... dragging the country into recession ... followed by the government subsidizing failing banks and industries.

Did we just describe America in the fall of 2008? Actually, this same scenario played out in Japan in 1989, followed by a deflationary economy that lasted the entire decade of the 1990s. The Nikkei stock index finally bottomed out in 2003. That recession was not a short-term cycle—it had decades-long impact.

What this means for society: Any recession creates some dislocation, but a Japan-scenario recession would be particularly painful for the

United States. In Japan, the prolonged recession drove fundamental restructuring of traditional employment and career expectations and resulted in a significant increase in the poverty rate. A recession extending a decade or more might have even greater social impact in America as the nation's largest generation of adults approaches retirement. More than half of Baby Boomers will retire without the benefit of a pension and hence are more vulnerable to the effects of a long-term downturn on their retirement savings.

What this means for museums: A recession extending well beyond a decade would turn everything upside down. Admissions revenue would be at risk if museums aren't able to provide greater value amidst declining household budgets. Donations, pledges, endowments and government support would be in jeopardy as well. School field trips are already being eliminated in states hit hard by the current fiscal crisis, and this could become the norm rather than a temporary round of budget cutting.

In 2034: Museums are stable oases in the midst of turmoil. Building on their tradition of offering low-cost or free access and programming, museums play an even greater role in sustaining the well-being of their communities during a prolonged downturn. Whether for the retiree managing a lower post-retirement income than anticipated, or for schools with fewer enrichment opportunities for their students, museums are there for their communities—even in periods when financial support from the community wanes.

it's a small world after all

In 1984, the United States was in the midst of transformational change. At the start of the 1980s, the global market was disproportionately U.S. dominated. But the U.S. trade imbalance quickly grew five-fold, driven primarily by an exchange

rate imbalance that fueled a rapid increase in Japanese auto imports and consumer preference for Japanese electronics. Today, the U.S. trade imbalance is six times higher than in 1984, and the U.S. is just one of many players in the global economy. We are now seeing a dramatic increase in the prominence of oil-producing countries and the growing economic powers of Brazil, Russia, India, China (the BRIC nations). Looking forward 25 years, it is clear that the OPEC and BRIC nations will play an even greater role in our lives here in the United States.

What this means for society: As the U.S. trade deficit continues to grow and other countries expand their presence in the American economy, more high-wage jobs will flow out of the country. As the dollars earned by foreign entities are reinvested in the U.S., more of the nation's most prominent assets and companies end up with foreign owners (e.g., the IBM PC division is now owned by the Chinese firm Lenovo, while the Abu Dhabi sovereign wealth fund holds significant U.S. assets ranging from the Chrysler Building to AMD's computer chip fabrication division). As wealth continues to increase in oil-producing and BRIC nations, 43% of the national debt is now held by foreign investors and governments. While the global economy is not necessarily bad for the United States, an increasing percentage of profits will continue to flow overseas.

What this means for museums: As a result of these ongoing trends, the increasing pace of globalization could continue to erode the current base of corporate philanthropic support. At the same time, larger museums will see the opportunities to ride the tide by going global themselves, opening more outposts in rapidly developing countries with an appetite for museums. The increase of wealth abroad (and among émigrés) may create new sources of funding for exhibits and programs about cultures growing in global prominence.

In 2034: Museums play an important role in helping communities with job losses reinvent themselves in the new knowledge-based economy. Responding to society's need for greater global awareness, museums increase their efforts to promote dialog and understanding about other cultures and our place in the global economy. Some museums serve as ambassadors to the rest of the world not just through overseas outposts but through traveling exhibits and more directed Web presence, helping interpreting U.S. culture to countries of growing influence.

the growing divide

Wealth has never been distributed evenly in the United States but rarely as unevenly as today: The top 5% of households generate a third of all earned income in the United States and the top 0.5% (roughly 500,000 American households) generate 14% of earned income. These are the highest ratios of income concentration since 1929, another auspicious year in American economic history.

The current concentration of wealth may be fundamentally unsustainable. Or it may simply reflect that well-educated people with a global outlook have significantly more ways to generate large incomes than those with less education and a more parochial perspective. And this is unlikely to change by 2034. Either way, the distribution of wealth in the U.S. will have an impact on museums.

What this means for society: The political effects of an economic divide are a wild card in any speculation about the future. During the past decade, the mean income in America has increased but the median income has declined; in other words, almost all the growth in American income occurred on the highest end of the spectrum. If this trend continues, some Americans will have much more wealth but most will have relatively less. But if the concentration of wealth reverses, it might lead to an erosion of the base of philanthropic support

for nonprofits, undermining the independent sector that currently performs so many vital functions. Extreme polarization of wealth may destabilize society and erode the civic process.

What this means for museums: A growing segment of society with relatively less money could result in fewer discretionary purchases like museum admissions, reinforcing the perception that museums exist only to serve the elite. Concentration of wealth also affects the potential size of the donor base. The recent wave of museum expansion was funded, in large part, by the accumulation of wealth among the highest earners rather than an increase in the number of wealthy Americans. In the wake of the recent economic crisis, many nonprofits are already concerned about their ability to collect on pledged donations. When Japan suffered a long-duration economic downturn in the 1980s, it led to a dissipation of corporate and individual support for the arts. Will the same happen in the United States? Museums may have to reconsider their funding models either way, relying more on donations from the economic elite if wealth continues to concentrate or on earned income and a wide base of donor support if the concentration of wealth reverses.

In 2034: Museums are among the few institutions that bring together people of all economic classes. They are increasingly valued for their ability to redistribute wealth in the form of access to scientific, cultural and artistic resources, mitigating the culture gap that arises from income disparities. Museums promote global education for the nation's children and global perspectives for all Americans. In the process, museums literally enrich America, because income is correlated with education and the ability to profit from economic globalization.

III. PERMANENT REVOLUTION IN COMMUNICATIONS



1982



2006



2034

By 1984, the first signs of a technological revolution were already evident with structural changes that continue to shape how we communicate and engage with others and will still shape our interactions in 2034. Traditionally, newspapers were the glue of most local communities but the total circulation for daily newspapers reached its peak in 1984 and started down the path of permanent decline. In part due to the rise of cable television, viewership for the three major television networks also started its descent. A wider range of entertainment and information options meant that fewer families were starting the morning with the newspaper and ending the evening by watching the same television programs. As a result, the common knowledge of Americans became much less universal and much more fragmented.

Household Penetration	Jan 1980	Dec 1984
Big 3 network audience	91%	80%
Number of TV channels	4	17
Cable TV	17%	40%

As traditional mass communications shifted, a new form of information management emerged, and America entered the golden quarter-century of personal computing. In 1981, IBM introduced the PC and hired Microsoft to develop the operating system. In 1982, two software companies released the first mainstream personal productive applications, the word processor (WordPerfect)

and the spreadsheet (Lotus 1-2-3). In 1983, the Department of Defense opened up broader access to the ARPANET, a distributed computing network designed to survive nuclear attack, and this network of a few hundred connected computers would eventually become known as the Internet.

Just over 25 years ago, *TIME* magazine named the PC as “person” of the year, marking the start of a truly seismic shift in how we work, play and interact with the world. We can’t provide a crystal ball regarding technological advances 25 years from now, but there’s one area in which we can see the seeds of change. Most of us reading this report learned to use technology as a productivity tool and continue to accept new technology as it marches forward. But as we examine the generation of young adults that grew up knowing nothing other than a connected world, we see major structural shifts underway that will reshape the expectations and behaviors of the American adult population in 2034.

digital = practically free

The trend of near-zero variable cost for storage and distribution has bypassed some museums, many of which continually race to catch up with technology. But this trend has already enabled companies such as Google and YouTube to emerge as dominant repositories for digital assets. As a result, we have witnessed a dramatic structural shift in the expectations of the public (particularly among young adults), which now expects anything that can be digitized to be digital—and usually free.

What this means for society: While these expectations are not quite as extreme for older audiences, they are inevitable for younger audiences simply because they have come to expect it from every single entity that they encounter. And that expectation has toppled industries and economic models in many information and entertainment fields from record labels, rock bands, telephone companies, Yellow Pages publishers, classified ads, stock brokerages and travel agencies. It's unlikely that the progression will stop.

What this means for museums: It is highly probable that this structural shift will change expectations for museum engagement as well.

- Already, Google, YouTube and Flickr have established themselves as museums of the digital world and are actively trying to redefine the idea of curating content. Who knows what emerging entities (Web 3.0? Web 10.0?) will encroach even further on the traditional (and future) functions of museums?
- According to research by the Institute for Museum and Library Services, 43% of museum visits in 2006 were remote, predominately via museum websites. This percentage is likely to rise, and the content of remote visits to museums will continue to shift from basic information gathering to more complicated forms of engagement.
- Museums and exhibit planners already confront questions about whether some aspects of the museum experience should be delivered entirely in digital format, if only to reach different audiences. These questions will not go away. Digitizing collections and other assets is a relatively simple challenge compared to what's ahead. While it is hard to predict the likelihood and impact of technical breakthroughs, our

interviews with technology visionaries point to advances in processing power and virtual rendering that will push us to view and engage with representations in entirely different ways.

In 2034: Museums confront many decisions about the collection, presentation and preservation of new forms of virtual objects. Meanwhile, as the world continues to go digital (and progressively virtual)—and as the cost of storage, distribution and processing power continues to plummet—people find themselves further divorced from the real. Yet the fundamental human condition responds to a variant of Newton's Third Law of Motion: The prevalence of the digital, virtual world raises public awareness of the increasingly rare world of non-digital assets that help tell the story of how humans got where we are. Museums play a more critical role than ever as purveyors of the authentic, addressing a human desire for the real as the wonders of technology march us towards the opposite path.

fragmented consumption and distribution of digital information



With the advance of technology across the media landscape, Americans today consume a personalized entertainment diet. Long gone are the

days when the entire country shared a collective conversation about slavery while watching Alex Haley's mini-series *Roots* on ABC. Under more pressure than even the television networks, newspapers have become an endangered species as the Internet ether continues to seep into the air we breathe. Profound structural shifts can be seen in a little-noticed Facebook byproduct. In Facebook's quest to serve as the operating system for a new generation, it has created a tool that generates the first truly personalized newspaper, with almost perfect editorial decisions, edited by a cloud of the members' peers and personal affiliations. Most people under 25 have never learned to pick up a daily newspaper, but consumer surveys by Reach Advisors show that members of this generation still feel pretty well informed.

What this means for society: The role of the expert that has existed for decades or centuries is quickly eroding and has been supplanted in many fields: sometimes by a network of peers (Facebook news instead of newspaper editors), sometimes by the digital masses (Yelp instead of the published Zagat guide), sometimes by a new set of collective experts (Wikipedia instead of the *Encyclopaedia Britannica*). This trend has led to an explosion of accessible information; in its own way, it has even expanded civic engagement. But it has diminished the role and responsibility of prior generations of experts (Walter Cronkite, Bob Woodward, Alex Haley) who used to help shape the collective experience of Americans. It becomes increasingly difficult for average users to assess the credibility of information accessed via the Web. Due to self-selection of sources of information and social networks, people rarely engage with those who hold opposing views. This further polarizes society and makes it more difficult to achieve political consensus regarding crucial policies.

What this means for museums: The effects of this structural shift are already emerging, even in some of the most expert-driven areas like medicine. The decline of the expert is already being played out in museums as well with multiple challenges to the authority of the curator. Will curators become irrelevant, like many of the other public expert roles? Or can museums rethink how they curate and interpret their collections, how they make those collections more accessible and how they involve diverse audiences in the meaningful work of museums?

In 2034: The collective experience is more fragmented than ever. But museums provide common experiences for diverse audiences, serving as safe public spaces for civic dialogue. As one of the most trusted sources of information, museums help people navigate the vast new world of information by filtering and validating credible content.

IV. myCULTURE

a creative renaissance

Along with increased computing power and the decreasing costs of technology came the advent of the personal computer as a recording or animation studio, movie-editing suite and publishing house. That was just the beginning. With increased digital connectivity came the advent of much more effective town squares and marketplaces, providing creative participants places to access better tools and information, and enabling creative producers to share and sell their output more efficiently.

Based on Reach Advisors' national survey work with young adults on issues outside of the museum field, we are seeing the emergence of a cultural shift that may prove to be a full-blown creative renaissance. The result will be a generation of young adults with more extensive creative pursuits than any other recent generation. This generation grew up with a broad palette of digital tools and creative resources; as a result, they are demonstrating an extraordinarily high level of creative output *and* creative consumption.

What this means for society: We project that significant new economic value will be produced by these pursuits, thanks to a far bigger base of creative producers, a wider range of creative output (including forms that we can't even envision today) and significantly better distribution opportunities for their creative product—matched by a broader base of creative consumption. Already, marketplaces such as Etsy are supplanting the need for artisans to travel to sell their handmade

works, and creating an audience of consumers who are used to looking for distant artisans before they turn to mainstream retailers.

What this means for museums: Museums have traditionally served as incubators and repositories of creative expression. While many of the trends discussed in this report present significant threats to museums, this is one shift that will allow museums to flourish as facilitators of the emerging creative renaissance.

In 2034: As incubators of creative expression, museums flourish as facilitators of the ongoing creative renaissance. They play a vital role in nurturing, documenting, organizing, interpreting and making accessible the new realm of creative output. Museums play an even greater role as economic engines in their communities, helping harness the value generated by the emerging wave of creative-driven commerce and exchange. They are repositories of knowledge about traditional craft, sources of inspiration for new designs and processes, and through their collections and exhibitions, validators of new artists and new art forms.

shifting conceptions of narrative

For most adults over the age of 30, “narrative” is a passive experience. To be sure, there have been models of self-directed narrative in a wide variety of media, from interactive *Star Trek* games on mainframe computers in the 1970s to fanzines, mix-tapes, the *Choose Your Own Adventure* book

series, even *The Matrix* movies, but these were mainly consumed by small groups of connoisseurs. For Americans under 30, there's an emerging structural shift in which consumers increasingly drive narrative.

A key factor has been the expansion of video gaming, now approaching almost universal consumption by American teens. And gaming is now more likely to be about the user as protagonist, driving the narrative. Some games are simply structured that way, while others enable *modding* (modifications of the software or hardware for unintended purposes driven by the user), and on the edge lies *Machinima*, virtual gaming worlds where players collaborate in person or online to produce and record their own narratives.

Moving one step younger, Scholastic has been shifting many of its new series of books (e.g., *The 39 Clues* for children ages 6–14) in the direction of enabling the reader to serve as the protagonist through websites and games that extend the experience with readers driving their experiences with the book series.

Once again, we're seeing an emerging structural shift where technology is fundamentally enabling and wiring expectations differently, particularly among younger audiences, this time when it comes to the concept of narrative.

What this means for society: One of the fundamental concerns is how the core driver behind this shift, video gaming, affects the development of children and young adults. On one hand, there is an uncannily strong correlation (although not necessarily causation) between the increase in video gaming and the decrease in school test score performance of boys over the past 15 years. On the other hand, video games have become increasingly complex, with engaged

role-playing, complicated problem-solving and components that players can design themselves. It's likely that this shift in narrative structure and expectations will drive a lot of how the next generation of adults expects to engage in the world.

What this means for museums: Over time, museum audiences are likely to expect to be part of the narrative experience at museums. While the overall story might not change, how it is presented may change to allow visitors to take on a role as a protagonist themselves. While this is a dramatic departure from how some museums structure narrative, it provides an opportunity to create deeper, more immersive experiences for visitors. For a glimpse of the future, an intriguing example of the emerging you-as-the-protagonist concept can already be seen at Conner Prairie Living History Museum's "Follow the North Star" program, where participants play the role of a fugitive slave on the Underground Railroad over the course of a mile of rough terrain at night, constantly confronted by friend or foe. We project this kind of immersive, interactive programming will be more of the norm than the exception as the generation coming of age now brings its own children to museums.

In 2034: While some educators still decry the impact of video gaming on academic development, museums provide unique opportunities for today's youth to exercise their gaming skills and satisfy their expectations for immersive narrative. This increases their engagement with museums but also with the community and the world, providing levels of social and global awareness they might not otherwise absorb while sitting in front of a screen.

respite and retreat

During Reach Advisors' interviews with technology visionaries across the country, it became evident to us that the U.S. will become even more technology-laden and hectic in the future. Just one example:

Many of the technology visionaries projected for us that core telecommunications technologies are coming to the point where cell phones will be small enough to fit inside our ear canals like a hearing aid, with near-perfect voice recognition that will negate the need for a keyboard. When this comes to pass, we will be living in a much noisier world than 1984 or even 2008.

What this means for society: While technological progress has brought much value to society, one byproduct of these emergent structural shifts in communication technologies is almost certainly going to be a world with fewer and fewer places where the public can find respite and retreat.

What this means for museums: At the same time, we're also seeing increasing backlash to the proliferation of technology in our research for museums and among the general public. Instead, our consumer research is finding indications of a longing for a retreat, particularly among women over 50 years old, a sentiment that we expect to expand as technology advances. The challenge will be the balancing act of positioning museums as exciting and engaging places to go, while providing a special spot to disengage from the day-to-day.

In 2034: In an increasingly atomized and digitized world, people still have a core desire for human engagement and authenticity. Museums will be oases of the real in an increasingly virtual world. Along with the outdoors and places of worship, museums represent the best opportunities for getting away from it all.



In 1967, *The President's Analyst* predicted that phones would become small enough to inject directly into the brain. By 2034, cell phones will certainly be small enough to hide in the ear canal.

James Chung, Susie Wilkening, Sally Johnstone
Reach Advisors
617.489.6180
james@reachadvisors.com

AFTERWORD: SHAPING THE NEXT 25 YEARS

With a better understanding of emerging trends that are shaping society, museums can do a better job of preparing for the impact of these trends on their own institutions. The trends discussed in this report are external to museums, requiring museums to react—whether early or late—if they want to benefit from the emerging structural shifts (or simply avoid the harms of inaction).

Responding to these trends may call for actions that seem tangential to or even divorced from the missions of many museums. It would be dangerous, however, for museums to focus on narrowly defined missions and trust that someone else will grapple with these challenges facing society. Whether a museum is in an urban core or a rural area, if its community is struggling, the museum is not going to be able to reach its full potential. A museum's viability is tied to its community's health. The good news, as we suggest in the snapshots the future, is that quite often there are actions that are central to museums' purpose, draw on their unique resources and can help society deal with seismic shifts in demographics, the economy, technology and culture.

This report is not the definitive word on the future—it is the starting point for conversation. We look forward to input from you over the coming year as we debate, refine and expand on these projections. And we look forward to hearing your ideas on what museums will look like in 2034 as they adapt to this new world.

Elizabeth Merritt
Center for the Future of Museums