



The Getty Leadership Institute

National *Arts* Strategies

CULTURAL ORGANIZATIONS AND CHANGING LEISURE TRENDS

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Cultural Organizations and Changing Leisure Trends: A National Convening, Online Discussion, and White Paper from

National Arts Strategies and the Getty Leadership Institute

Primary Author: Andrew Taylor, Director,
Bolz Center for Arts Administration, University of Wisconsin-Madison
Editors: Russell Willis Taylor, President and CEO, National Arts Strategies;
and Philip M. Nowlen, Head, Getty Leadership Institute

For two working days in May 2007, a group of 34 leaders from arts, culture, entertainment, commerce, and academia focused on the issue of leisure in America. While the effort and its subject may seem a bit of a disconnect (working at understanding leisure), the conversations underscored the fact that leisure trends are serious business for cultural organizations. The changing shape and nature of non-work life fundamentally frames the public's engagement with the arts, humanities, and sciences. This group convened to consider whether and how cultural organizations might respond to that changing frame, and where the shifts might take the interplay of leisure and cultural experience in the future.

Hosted by National Arts Strategies (NAS) and the Getty Leadership Institute (GLI), the convening was facilitated by Steven Tepper, Associate Director of the Curb Center for Art, Enterprise and Public Policy at Vanderbilt University.

So, what did we discuss and discover?

Perception isn't (always) reality

While many claim to be working more and relaxing less, the average American has *more* leisure time than his or her counterpart in 1965 – five to six hours more per week, according to time-diary studies. The average increase in leisure time was more than matched, however, with an average increase in time in front of the television.

But perception is more than enough

Despite the stats, the number of people who state that they are feeling depressed and anxious is rising. Sleeping pill prescriptions are increasing (from 26.25 million in 2000 to 42 million in 2005). Other indicators suggest a loss of perceived control over time and environment.

Which leads us to do more (with more)

Multi-tracking and multi-tasking are increasingly defining American life, with almost 50 percent of Americans “working with colleagues” over their lunch break, and the lunch hour shrinking to 30 minutes. Teens are showing an even more multi-track life, with 45 percent of them engaging in multiple simultaneous instant messaging conversations as part of their on-line life. A large portion of our television viewing is as background to other tasks or activities.

Although none of us can actually “multi-task”

Our resident psychology expert reminded us that humans can't actually pay attention to two tasks simultaneously, but rather need to switch focus from one to the other and back again. This constant switching of attention has come to define our workday, where we're lucky to get 11 whole minutes to focus on a single task. There was a belief among the group that both work and leisure life are now defined by interruption, by erratic focus and attention.

Either way, we take up more space

The average size of the American home has grown massively larger in the past fifty years (from 983 square feet in 1950 to over 2,400 square feet in 2005), while the percentage of single-member U.S. households has risen.

Leaving us alone more often (and often by choice)

More Americans are commuting longer to get to work, and driving it alone. More than 30 percent of us now own iPods or similar portable digital audio devices to experience music alone, even when in a crowd. More than half of all American youth (age 12 to 17) own such devices.

And doing less of almost everything (official)

Census data showed decreased participation, a decrease in most leisure activities from 1982 to 2002, with dramatic drops in gardening, home improvements, and sports events, and lesser declines in active sports, outdoor activities, and amusement parks. Arts participation remained level in the same period, while exercise showed an increase.

Giving the arts about nine hours a year

Time-diary studies showed an average of 0.17 hours per week spent in conventional arts participation (theaters, concerts, museums, etc.), or just under nine hours a year. While the focus of the Getty convening was broader than the arts (including heritage, science, humanities, and entertainment), the number provided a sobering sense of scale.

Except for the hours we make art ourselves

A full 54 percent of all U.S. households had at least one member who played a musical instrument in 2003 (up from 38 percent in 1997). While a 2005 study of teenagers found that 57 percent of them create content on the Internet.

And, perhaps, the hours we spend in an alternate world

The rise of broadband Internet and computer gaming is creating new spaces for consumer and cultural experience, many of them still unexplored by traditional cultural organizations. The virtual, multi-user world of Second Life claimed more than 5.8 million residents in April 2007, spending 1.6 million U.S. dollars in a single day.

Further blending the distinction between the “simulated” and the “real”

One conference participant quoted research suggesting that consumers still perceive an original, tangible object as superior in quality to any simulation. But he noted that the dominance wouldn't last much longer. Somewhere between 2015 and 2018, he said, a well-crafted simulation may well be perceived as higher in quality than its tangible counterpart.

And leaving us all wondering how to choose to spend our fractured leisure time

The explosion of choice and access in a digitally networked world has also dramatically changed the filters we rely on to allocate our attention. Trusted content authorities like

newspaper editors and cultural curators have lost influence, while social networks and referrals have gained new importance. In the age of Google and weblog analysis systems like Technorati, “authority” is now a function of the number of individuals who reference your opinion, not the credentials you bring to the task.

While we strive to connect the many fragments of our experience

Several participants from the consumer goods and commercial entertainment industries presented a parallel track to the fractured world, suggesting that narrative understanding was becoming the new need of corporate and consumer life. As nonprofit cultural organizations were struggling to show their connection and value, commercial enterprise has been rediscovering the need for story and context in all that they do. Among engineers and product designers, for example, well-crafted narrative from the consumer’s point of view is bringing new insight into how products connect to daily life (leading at least one company to commission independent filmmakers to interpret and present in film their strategic planning documents). Leading-edge consumer research suggests that consumers define the value of products and services not just for their utility, but also for their impact on “emotion over time.” In this world, even the most functional consumer products strive to become part of an extended narrative, with a satisfying plot structure and conclusion.

In there, somewhere, is cultural experience

Within these facts, trends, and insights, the conference participants narrowed their focus to the nonprofit and public “cultural industries” – a small but significant sector intended to foster, produce, present, and preserve the expressive and interpretive lives of human society. They defined an industry infrastructure often heavy on the “hardware” of cultural experience – facilities, objects, technical production spaces – but thin on the human and financial resources required to make full and adaptive use of that hardware. They expressed a general sense of growing disconnect between professional, established cultural organizations and the lives of their communities. And many wondered out loud whether our perceptions of decline in cultural participation were due to a flawed boundary to our analysis. Said one participant:

“Are we really confident about a declining participation in culture, or are we only seeing a shift in how that culture is experienced? Perhaps the citizen’s connection to ‘dramatic narrative,’ for example, is stronger than it ever was, just not through traditional nonprofit theater.”

Still others wondered if the established conventions of participation in professional culture were compatible with the shifting expectations and demands of contemporary audiences. In a world where time and attention are fractured and choices are great, the extended and exclusive nature of many established cultural experiences might come at too high an opportunity cost.

The focus of the conversation then inevitably moved to realigning business models and organizational structure in fostering, producing, preserving, and delivering cultural experiences. Participants pointed to emerging models of cultural selection and transaction – from iTunes to Netflix, from Amazon’s recommendation engine to the distributed financing model of ArtistShare.com – and wondered how they might inform the rest of the cultural world.

Many of these emerging models take advantage of new profitability at the low-volume end of the cultural market – niche recordings or independent films. The “long tail” of cultural experience, trailing off from the blockbusters and mass culture that attract the large majority of revenue and attention, offered real potential in sustaining micro-markets, and providing small and focused communities with new connections.

One participant from the museum world, for example, envisioned a new life for significant but rarely presented objects in his organization’s collection. In serving its geographic area, the museum has difficulty building sustainable interest in their illustrated manuscript collection. But at an international scale, a vibrant community of interested individuals could explore and discuss the collection, and provide resources to sustain it over time.

Several other participants saw the increasingly crowded environment as a call to clarify and define the unique aspects of live cultural experience. One sought in his work to deliver “an intellectually or emotionally rewarding experience that would be diminished in any other medium.” Others suggested that digital media offered new gateways to live experience, as in the Metropolitan Opera’s productions filmed and presented in cinema venues across the country. Some wondered if these new media efforts would become substitute, complementary, or unique experiences to live performance in the minds of the audience.

By the end of day one, the group had come around to at least three clusters of opportunity for cultural organizations in all sectors – nonprofit, public, commercial, and informal. In the vastly changing and unpredictable world of leisure trends, these three clusters suggested areas of focus for the scenario and future planning work yet to come in the second day:

Culture as respite

One response to an increasingly fractured leisure/work environment would be to provide an alternative space, different from daily life. Where much of life was interrupted and shifting, these spaces would be focused and immersive. Some suggested that this alternative not only served the shifting market, but also served as a countervailing balance against the individualism, competition, and short-term focus driving many elements of society.

Culture as connector

An alternate response to the same environment would be to recognize expression as a means to embrace complexity, to uncover a through line to a seemingly

disconnected life, and to connect our individual experiences to a wider range of individuals. Just as other consumer industries are commissioning skilled artists and craftspeople to interpret their market, define their objectives, and shift their strategic frame, cultural organizations could reinforce their unique potential for context, challenge, and connection.

Culture as continuum

Still another response discussed in the convening, perhaps interconnected with the others, would be to encourage a more seamless connection between expression and daily life. This effort would foster the expressive potential of every citizen, while connecting the exceptional artists and craftspeople within that continuum. In this world, art, science, humanities, and heritage would be integral to work and leisure, not unique and discernable endeavors.

Diving into scenarios

Day two of the NAS/GLI convening shifted from a discussion of past and present trends toward an emphasis on future action. Through a scenario exercise, participants explored in small workgroups multiple possible futures from the perspective of a single cultural organization. Their job was to envision a dynamic, sustainable, and connected organization for each of the futures described.

Each scenario was derived from the intersection of two possible trends. For example, the first scenario described four possible futures at the intersection of time and money. Along one axis, the predominant audience had more or less disposable income. Along the other axis, the predominant audience had more or less available time (see appendix for the scenario). The intersection of these axes created four possible futures (more money, less time; more money, more time; etc.). And each future was described with a title and short narrative. Each group was assigned a cultural organization to lead into these futures.

Each response is briefly described in the appendix to this report. The framing scenarios are also included. The framing scenarios are included as appendices to this report.

Upon hearing the scenarios and the responses of each organization, several participants were struck by a new openness and interest in changing significant elements of organizational practice, programming, and even mission in the face of a changing environment. Conversations that might have previously dead-ended in an argument between responding to market or mission were more malleable, at least at this convening. Innovation and change seemed natural and necessary, perhaps, in part, because the organizations in question were fictional, and unrestrained by established governing boards, specific staff, and restrictive supporters. According to one participant:

“As an industry, our reflex has become to defend ourselves and our way of working in the face of changes around us. It was refreshing to consider actual, substantive change in the face of an emerging reality.”

Departing Thoughts

In the final sessions of the convening, the hosts and facilitator encouraged the group to consider the larger perspective of approaching cultural vitality for all Americans, rather than sustainability and connection for individual organizations. The group explored what “cultural vitality” might look like, suggesting indicators such as vigorous public discourse; integrated curriculum in public schools related to arts, humanities, and sciences; robust artistic production; the perception of artists as engaged citizens; free expression; the perception of cultural role models within the local community; high employment for artists; a broad sense of expressive capacity and opportunity within each citizen; tolerance for different ideas; high participation in both formal and informal cultural events; a healthy interaction of amateur and professional arts; and so on.

It was clear to the group that more research was needed, as well as a new culture of learning and exploration throughout the cultural industries. To some, we are entering the most aesthetically engaged and expressive society ever to roam the planet. To others, these new opportunities seem destined only for a privileged percentage. For all, the powerful role of expression, discovery, connection, and identity would continue to find a way, regardless of the action or inaction of cultural organizations. And that only focused intent, openness, curiosity, risk, and innovation would foster a positive and relevant role for cultural organizations in the evolving leisure landscape.

Appendix 1: Scenario Exercises

The following are brief descriptions of the future organizations envisioned by workgroups through the scenario planning process. Each workgroup was given one or more cultural organizations and a series of scenarios, and asked to describe an appropriate programming mix for the various possible worlds.

The History Museum

One working group explored two possible futures for a history museum – one in which the audience had less time but more money (“Just-in-Time VIPs”), the other in which the audience had less money and more time (“19th Century All Over Again”).

In the first future, the museum offered a customized entry to its programming, focused on “your place in history.” Visitors could select a number of “22-minute history workouts” provided by podcast, and customized to specific interest. Patrons could also engage in “drive-by history” through the integration of a global positioning system in their car, and automated audio guides tied to specific historic locations. “History for Hire” services would create customized, small-group experiences with historical topics or objects – in home salons, school visits, or small-group presentations on request.

In a world with less money but more time, the museum would offer more accessible, more immersive services, with an emphasis on “our place in history.” With limited patron resources, programs would be government-supported or sponsored by contributors, and staffed by volunteers. The community-supported museum would also strive to be responsive to community needs. The more available time would create opportunities for “deep dive” experiences of history, through a series of hour-long explorations of the museum’s collection.

The Regional Symphony

Another scenario explored the future of a regional symphony in multiple environments. In all cases, they envisioned their organization as tightly connected to its community, serving as a “sound partner” to community life, and selecting their staff, board, and musicians according to community fit rather than exclusively technical excellence. The orchestra would be “owned” by its musicians, and would not have an artistic director.

In a world of less time and more money, the symphony would offer concierge service, a club environment, exceptional catering, and would work to remove barriers to participation while maintaining premium services in support of its bottom line.

In a world with more time and more money, the symphony would also contract with cruise ships and other resort opportunities.

If the future held less time and less money, the symphony would partner with iTunes, offer performances in Best Buy for do-it-yourself recording enthusiasts, and make their recorded performances available to music mixers and mash-ups.

Finally, in a world of more time and less money, the symphony would foster community engagement at all levels, including audience input on the works to be performed, a mix of amateur and professional musicians, and studio recording capabilities for the ensemble and for others.

Los Angeles Performing Arts Network

Another work group was assigned a metropolitan performing arts organization with multiple venues scattered throughout town, and a resident symphony. They envisioned an organization that would offer multiple experience tracks to accommodate audiences from *any* of the possible futures.

For patrons with more money and less time, the organization would offer exceptional seats with flexible use requirements (unused tickets could be donated back). A chamber series would offer more personal performance experiences closer to the patron's home community. And flexible attendance would allow a quick experience with a glass of wine and a single work, for those on their way to other activities.

For patrons with less time and less money, the organization would offer stages of engagement, so the audience member could continue or exit at any time. A pre-party with freebies would draw them in, connections with friends and peers would encourage them to stay for the performance.

Patrons with less money but more time would have additional opportunities to engage in conversation about the performances, and to weave the events into their "self-curated" life. Creative opportunities would allow them to participate as performers as well as attendees.

The "leisure class" with more time and more money would be served with behind-the-scenes tours, first-class amenities, and opportunities to express their commitment to excellence and community through financial contributions. "Ultimate skybox" opportunities would allow business and leisure to be combined at organization events. And the facility would be designed toward their high aesthetic standards.

To accomplish all of these goals with multiple audiences, the organization would have a flat structure, would leverage resources from those willing and able to pay (to subsidize those who cannot), and would support on-going research on audience and community needs to ensure its continual connection and relevance. The organization would also present in "found spaces" convenient to the surrounding community, and create a "hub and spoke" presenting structure closely tied to community cultural districts.

The Municipal Park

The final working group was assigned a municipal park network in a sunbelt city, and encouraged to consider its future under the same scenarios. Core values of the park system under any scenario included open access to all citizens, and emphasis on the unique value of diverse, live, social encounters in natural public space.

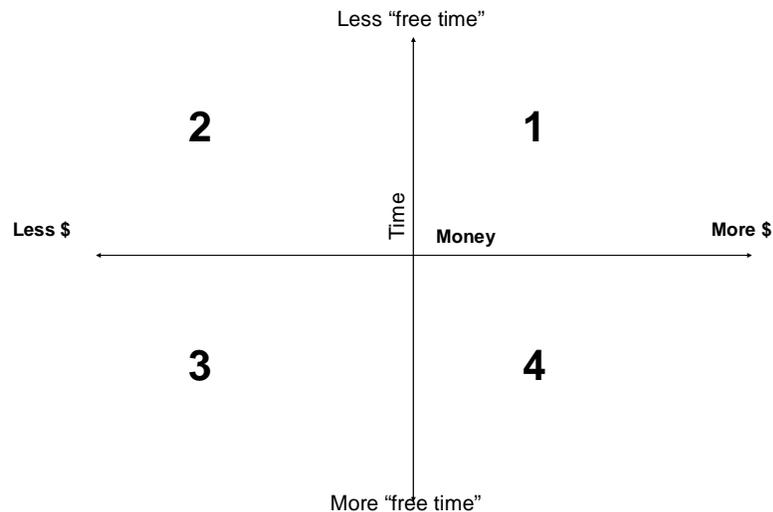
In a future with less time and more money, the park system would cater some of its resources to preferred and premium customers, while maintaining open access to other parks. Modeled on Tivoli Gardens in Copenhagen, these premium parks would offer boutique spaces, earned revenue opportunities, and other unique services to support the low-time lifestyle.

In a world with less time and less money, the park system would work to connect the park with pragmatic, daily-life activities that might be enhanced by natural public space. Dog walking, exercising, and neighborhood functions would be core uses of the parks, offering aesthetic and social opportunities for patrons with little money and busy schedules.

More time and less money within the community would lead to educational and hands-on services – pottery classes, nature walks, community gardens, social clubs, and community events.

Finally, a “leisure class” community of more time and more money would provide premium immersion experiences and differentiated parks within the network – one focused on golf, another on water sports, another on nature conservation.

Appendix 2: Money and Time Scenario



1. JIT VIPs (*more money, less time*)

This is a world where people are willing to pay an extra premium for convenient access to culture. Everyone can be a VIP. They will pay extra to avoid standing in lines at the movies or at restaurants and will gladly pay for the ability to make last minute decisions. Audiences will want to keep all of their options open as long as possible. – “just in time” leisure. This is also a world of “drive-by” culture – as people will search out experiences that allow them to drop in or drive by without having to commit significant amounts of time.

2. Cheap and Easy (*less money, less time*)

This is a world where people are looking for culture that will fit into their busy schedules, and will not cost them a lot of money. They will want culture on their phones, PDAs, televisions and computers. This will be culture that is heavily driven by advertising revenue and commercial sponsorship. And, “leisure at scale” will dominate – with organizations trying to reduce costs by mass producing culture.

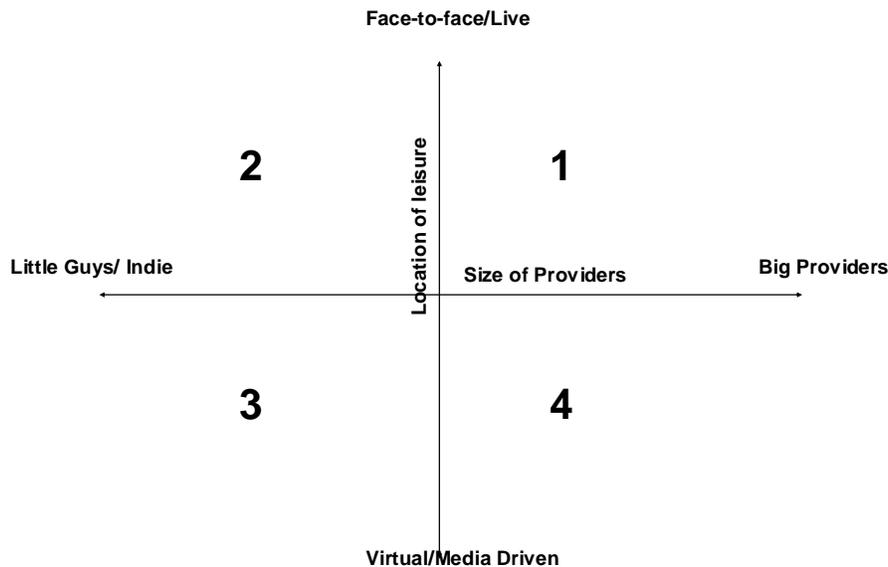
3. 19th Century All Over Again (*less money, more time*)

This is a world where people make and share their own culture. They have the time to invest in their own cultural pursuits but do not have the money to spend on “professionally” produced and packaged art and culture. It is a world dominated by professional amateur artists. People engage with arts and culture locally, and the arts have a decidedly community feel about them. For those digitally savvy citizens, this is a world where you have the time to search the vast sea of cultural offerings, looking for “free culture” or stealing culture that you cannot get for free. This is also a world where “mavens” rule – people who have the time and inclination to search out great (and inexpensive) cultural offerings and make recommendations to their friends and family.

4. The Leisure Class (*more money, more time*)

This is a world where people have the time and money to treat themselves to the very best that culture can provide. Luxury cruises, resorts, dude ranch holidays, and other “full service” leisure experiences will be in high demand. People will want to fully immerse themselves and escape into “leisure” paradises.

Appendix 3: Location of Leisure and Size of Provider Scenario



1. Cathedrals of Consumption (*live venues, big providers*)

This is a world of large spectacle – elaborate casinos, enormous theme parks, deluxe cruise ships, blockbuster exhibitions and larger and larger cineplexes. The big entertainment providers will get even bigger and offer synergistic, orgasmic, encompassing shopping and leisure experiences. People will leave their homes to join with others around culture and entertainment, but these gathering places will be highly controlled, rationalized, commodified and market-driven.

2. Everything is a Scene (*live venues, small providers*)

This is a world dominated by independent and small media producers and cultural organizations; with audiences and consumers increasingly looking to engage with culture on a personal, live and face-to-face basis. In the future, we witness an explosion of local scenes – live clubs, art galleries, local restaurants. People are leaving their homes and interacting with a wide mix of local art forms – with new organizations and cultural entrepreneurs taking root everyday.

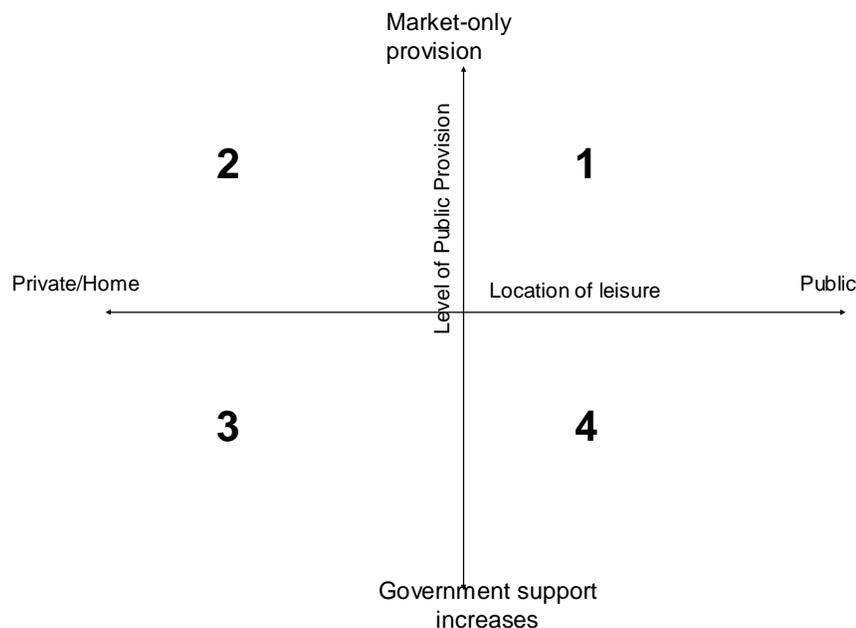
3. World Bazaar (*virtual venues, small providers*)

This is a world where small and enterprising artists and arts presenters find a foothold in the global cultural economy. Everyone is a global entrepreneur, producing films, music, exhibits, clothing, and toys that can be marketed online across the world. No one is making much money, and like a bazaar, there is a lot of competition. But, there is a lot of culture offered and people are buying, selling and trading.

4. AOL Nation (*virtual venues, big providers*)

This is a world where culture and entertainment increasingly must pass through large media portals in order to reach significant audiences – AOL, Google, and Yahoo. These gatekeepers may provide a large variety of culture and may – like Wal-Mart – depend on cultural suppliers of all sizes from across the world. And, like Wal-Mart, they will have the power to broker deals and develop business models that benefit their bottom lines; in the process they may distort and damage parts of the cultural ecosystem – affecting the type of culture that gets produced and the methods of distribution. These gatekeepers could get so big that they increasingly control access to information about culture – so even local events and venues will be represented, or not, through these large portals. It will be hard to survive in this world if you cannot find a way to get through these gates.

Appendix 4: Public Spending on Leisure and Leisure Location Scenario



1. Arcade Culture (*market-driven, public spaces*)

This world is host to “cathedrals of consumption” – Disney World, casinos, mega churches – places that allow people to “shop” for and experience culture while in the presence of others. In such a world, everything is for sale and cultural organizations survive on earned income and shopping, product placement, and corporate sponsorship. Private, for-profit museums, zoos, and parks will spring up and compete for audiences.

2. My Home, My Castle (*market-driven, private spaces*)

In this world, there is very little public provision of leisure, and existing market forces emphasize private and home-based consumption. People continue to invest in extravagant systems of home entertainment – home theaters, convergent media, high definition television, etc. They also have fully integrated mobile media devices, so that their “home portfolio” of culture can travel with them. As cultural providers become more sophisticated in their audience research, it is quite likely that we will see a hyper segmentation of the market. Every citizen/consumer will be allocated to ever smaller and more defined preference groups – e.g., 18-year-old, Hispanic girls who like Bonnie Bell cosmetics; hatchback cars; Vogue magazine; soccer and George Bush. This segmentation will create the “daily me” phenomena – where citizens dig deeper into their own cultural wells – surrounding themselves with the opinions, culture and experiences that reinforce their existing preferences.

3. The Cultivated Citizen (*government-supported, private spaces*)

In this world, public provision of culture focuses either on helping citizens realize and tap their own expressive capacities or delivering “great art” to their living rooms. The government also increases access to culture by delivering free, universal broadband service. Arts education is almost universal and subsidized media centers are widespread. PBS is stronger than ever.

4. Today’s WPA (*government-supported, public spaces*)

In this world, there is substantial public provision of leisure and entertainment. Parks, bike trails, and other outdoor venues are well supported. Large cultural facilities, especially those that appeal to a broad public, are flourishing, as are outdoor festivals, Shakespeare in the park and other sites of public leisure.



List of Participants

Sasha Anawalt

Director
USC Annenberg/Getty Arts Journalism Program

Nina Archabal

Director
Minnesota Historical Society

Alec Bernstein

Senior Director, Strategy, Research and
Strategic Partnering
BMW Group, Designworks USA

Barry Braverman

Consultant, formerly with Disney Imagineering

Alan Brown

Principal
WolfBrown

Ben Cameron

Program Director for the Arts
Doris Duke Charitable Foundation

Gail Crider

Vice President
National Arts Strategies

Kathleen Crowther

Executive Director
Cleveland Restoration Society

Adrian Ellis

President
AEA Consulting

Kenneth Fischer

President, University Musical Society
University of Michigan

Eric Gibson

Leisure and Arts Editor
The Wall Street Journal

Rudy Guglielmo, Jr.

Program Officer
Bush Foundation

Kathy Halbreich

Director
Walker Art Center

MiJin Hong

Senior Program Specialist
The Getty Leadership Institute

Emlyn Koster

President and CEO
Liberty Science Center

Michael McDowell

Senior Director, Cultural Tourism
LA Inc. The Convention and Visitors Bureau

Douglas McLennan

Editor in Chief
ArtsJournal

Maureen Michaels

Founder and President
Michaels Opinion Research

Patricia Mooradian

President
The Henry Ford

Douglas Myers

Executive Director
San Diego Zoo

Philip Nowlen

Head
The Getty Leadership Institute

Diane Ragsdale

Associate Program Officer
Performing Arts Program
Andrew W. Mellon Foundation



List of Participants

Mark Resnick
Executive Vice President
Twentieth Century Fox

John Robinson
Professor of Sociology
Department of Sociology
University of Maryland

Michael Ross
Executive Director
Krannert Center for the Performing Arts
University of Illinois at Urbana-Champaign

Andrew Taylor
Director
Bolz Center for Arts Administration
University of Wisconsin at Madison

Russell Willis Taylor
President and CEO
National Arts Strategies

Steven Tepper
Associate Director, Curb Center for Art,
Enterprise and Public Policy
Vanderbilt University

David Touve
PhD Program, Management
Owen Graduate School of Management
Vanderbilt University

Gary Vikan
Director
Walters Art Museum

Joan Weinstein
Associate Director
The Getty Foundation

Peter Whybrow
Director
Semel Institute for Neuroscience and
Human Behavior
University of California, Los Angeles