

Evaluating Capital Investment Needs for Arts Centres in the UK

A Collaboration Between Future Arts Centres and Arup

May 2025



Future
Arts
Centres

ARUP

Foreword

Future Arts Centres is a UK network that champions the unique importance of arts centres at a local, regional and national level.

The strength of Future Arts Centres lies in the diversity of its membership and its foundations are in peer-support; it brings together leaders from over 170 arts centres to engage in action learning, share best practice and to develop innovative business models.

Arts centres vary in scale, but typically share the characteristics of being multi-artform, public-facing buildings with strong participatory programmes and relationships with their local communities.

We recently conducted surveys which indicated the poor state of the majority of buildings across the network. These showed that 78% of members had lifts break down in the last year, 63% would need to replace heating or ventilation systems within three years, and an incredible 93% had suffered leaks in the last year, with the majority causing damage and disrupting activities for 46% of members.

The need for capital investment was clearly the top priority for many arts centres, which led us to this collaboration with Arup to provide much needed evidence and help us determine the scale of the issue we need to address.

[About Us - Future Arts Centres](#)



Gavin Barlow
Co-Director | Future Arts Centres



Annabel Turpin
Co-Director | Future Arts Centres

For the Arts & Culture sector, the built environment is a critically important enabler of their craft, and their connection with communities across the UK.

As the world changes faster than ever before, the way that the physical places where we gather as communities are impactful and inclusive is evermore important, as through cultural activities, we form social bonds that drive community identity.

Arup's studies of city resilience around the world indicate that this identity, and by extension cultural activities, are intrinsically linked to community and city resilience and sustainability.

In our approach to the challenge, we have brought our deep relationship with the sector as a designer and thought leader, together with our broad knowledge across diverse sectors within the built environment in the UK.

We are very pleased to have this opportunity to collaborate with Future Arts Centres to participate in what we believe is a discussion of great importance for the UK.



Tateo Nakajima
Arup Fellow |
Arts, Culture and Entertainment

Executive summary

Arts centres across the UK play a vital role in their communities, providing spaces for creativity, cultural engagement, and social connection. However, many of their buildings are now facing increasing maintenance challenges, with ageing infrastructure and growing financial pressures making it harder for them to welcome communities consistently and enable organisations to operate at their full potential.

The research undertaken for this report shows that, while arts centres remain ambitious and committed to delivering high-quality experiences, **there is a clear need for ongoing investment** to ensure their buildings remain fit for purpose. Over three quarters of arts centres surveyed report being unable to carry out planned work on their buildings: **78% indicate they are behind schedule on planned major projects** and **45% report difficulties with standard operational maintenance**.

The report indicates a potentially consistent lack of investment in long-term maintenance as over **60% of venues surveyed report having had no renovation** or refurbishment within the last 10 years, including 25% where there have been no relevant works within recent memory. **Local authority-owned venues appear to face particular pressures**, with **83% reporting they are behind on significant maintenance projects** - although a high number (53%) of independently operated spaces also reported challenges.

The findings of this report highlight the importance of **strategic, long-term investment** to maintain and enhance the UK's arts infrastructure

Understanding the Sector's needs

The survey responses highlight a range of immediate, recognised priorities for arts centres:

- **Addressing the maintenance backlog** – In the venues who reported being behind on maintenance, a third suggest they are on the verge of not being able to meet audience expectations, signalling a growing and critical need for reinvestment
- **Enhancing accessibility** – Facilities such as hearing accessibility, sensory-friendly spaces, and improved backstage access for performers were frequently cited as areas for improvement
- **Investment in energy efficiency** – Many venues are looking to improve sustainability through upgrades to heating systems, insulation, and energy management

Additionally, we anticipate wider transformation activities will be required to empower arts centres to succeed as places for communities to gather. **Advances in digital technology** are one such priority, which not only offer significant efficiencies but are expected to drive changes in virtual production design and delivery, and audience expectations.

While further analysis and a larger sample of data is needed to establish the full national picture, the findings provide a valuable starting point for discussions on sector-wide funding priorities.

Looking ahead

Despite these challenges, arts centres continue to **demonstrate resilience and adaptability**, seeking ways to balance the needs of their buildings with their ambition to serve communities in new and innovative ways.

The data collected has limitations and there are important topics yet to be explored. The survey responses suggest the need for support for both standard operational maintenance and repairs, and lifecycle capital reinvestment, but this report does not explore these in detail. Likewise, as we looked at one moment in time, we have not yet studied the depreciation rate for arts centres, and this will be needed to support a sustainable and long-term investment strategy. This report demonstrates that **investment in arts centre buildings is not just about maintenance—it is about securing the long-term cultural sustainability of our communities and the spaces they gather in**. As audience expectations evolve and environmental considerations become more pressing, arts centres will need to adapt, and the condition of their buildings will play a crucial role in their ability to do so.

By taking a proactive approach to capital investment, the sector can ensure that arts centres continue to thrive, offering inspiring spaces where audiences feel safe and welcome, and artists can grow their practices. These buildings enable arts centres to create, support and nurture communities. We must act now to ensure they can continue to do so for generations to come.

The Ask

How can we understand the level of capital investment needed in arts centres to support its ability to deliver positive social value and economic impacts to the UK?

The Approach

1. A Way to Consider Lifecycle Costs

An informal survey of our clients around the world has confirmed that the arts sector globally has not developed a consistent way to understand estimate lifecycle costs specifically for the sector, typically relying on needs-based evaluation on an individual venue basis.

We have therefore turned to other sectors in the UK to inform a high-level approach.

2. Keeping Up with Maintenance

This study explored two approaches to estimate the investment needed across UK arts centres:

1. **Lifecycle capital reinvestment based on building value** – Applying a 22-25% reinvestment estimate suggests a substantial but necessary level of funding over the next 25 years.
2. **Costs based on floor area** – Using benchmarks for theatres and concert halls, projected annual maintenance costs for arts centres fall within a comparable range, reinforcing the need for sustained funding.

We tested the plausibility of the approaches using data from a survey to Future Arts Centres members.

3. What is the Industry Facing?

Understanding challenges that arts organisations will be facing in the near future, which suggest a need to improve their facilities will give additional perspective on the scale of funds needed to move beyond the lifecycle analysis.

4. Readiness to Meet the Future

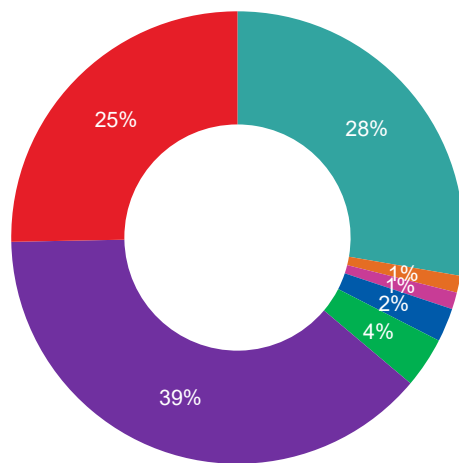
Finally, an evaluation should be undertaken to understand what gaps exist in the market.

While such a gap analysis is beyond the scope of this initial study, the trends outlined in the Future of Arts & Culture project provide some insight into such analysis.

These insights are drawn from our work with the sector around the world on their relationship with the built environment, as well as global research that Arup has undertaken with industry partners on [the Future of Arts & Culture](#).

Future Arts Centres Member Survey Responses A Snapshot

- Amplified music
- Unamplified music
- Dance
- Exhibitions
- Film
- Theatre and performance (black box)
- Theatre and performance (proscenium)



Primary art forms

90

Number of responders

9.4M

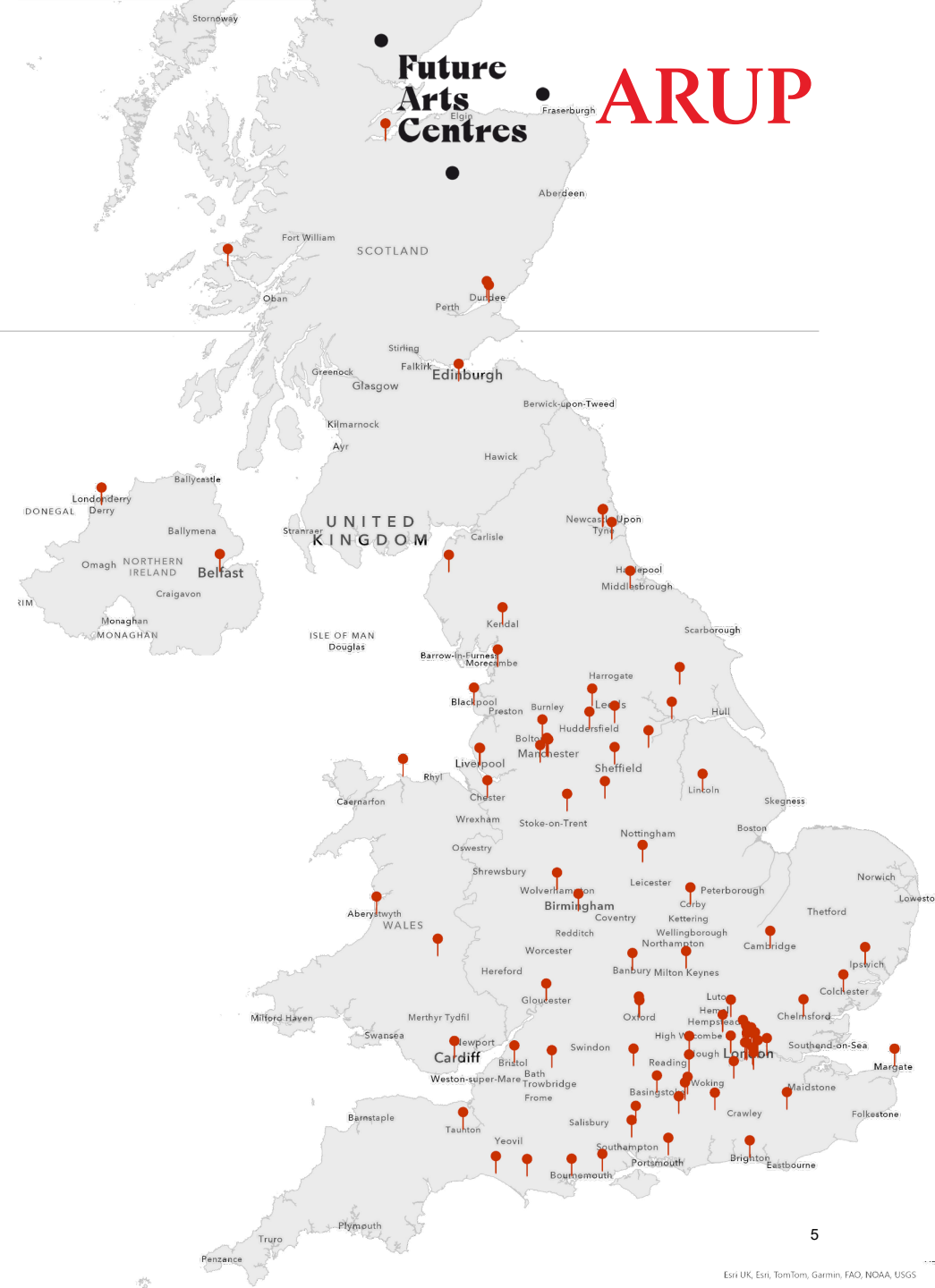
Total visitor number
across all responders

2,673

Average square metre
footprint

1680-2025

Construction dates of
surveyed arts centres



1. A Way to Consider Lifecycle Costs

We sought to establish if there is a credible methodology to answer the question of how much investment is needed for capital works in arts centres in the UK. In doing so we conducted an informal review with Arup clients internationally to understand how other countries consider this topic and then looked to two methodologies used by different sectors in the UK – estimations made with capex, and estimations made with area.

1. A Way to Consider Lifecycle Costs

1.1 An Informal Consultation with our Global Clients

As a first approach to the question, we reviewed our work and informally consulted with several of Arup's clients from around the world to see if we could identify a top-down approach to the question that the UK could consider. While inquiries continue, based on the range of clients we were able to speak to we were not able to identify such a case through this process to date.

The clients we spoke to confidentially shared approaches that were based on demonstrated need and project-based development. Where long term allocations for maintenance were included in budgets, they were based on historical precedent of the specific institution rather than an industry benchmark.

One notable exception was an Arup project in Switzerland for a new performing arts facility, where we were advised that building insurers would require that a capital reserve fund be maintained by the venue operator, at minimum equivalent to 1.2% of initial construction costs added every year, and 1% of initial performance equipment cost to fund replacements. Contingency and inflation would be added to these allocations.

Nonetheless, not finding a clear benchmark by which the UK could answer the question, we broadened our approach to consider two other ways to consider top-down estimation of lifecycle costs for the arts & culture sector.



Hat Factory Arts Centre - Building © Shaun Armstrong

1. A Way to Consider Lifecycle Costs

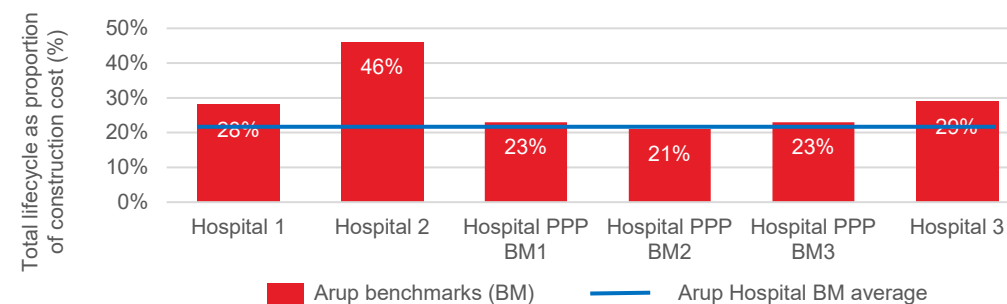
1.2 Lifecycle Capital Reinvestment Costs as a Proportion of Capex

Looking to other sectors, we identified social infrastructure as potentially comparable for arts centres. Hospitals as a typology have comparable complexity in design (though more repetition in spaces) but have higher usage/occupancy, and while schools generally include less specialist equipment and can be more standardised as a typology, they have a more comparable day-to-day use rate.

Prior work to understand average maintenance investment per building type as a proportion of construction, by Arup's Investment Advisory team for Private Finance Initiative (PFI) investors, offer interesting insights for arts centres' buildings. In this context, investors need to understand the capital expenditure they should expect to have, in order to maintain the performance of the built asset over the investment period. This number would include efficiency upgrades (such as upgrading mechanical plant and energy efficient lighting) but excluding expansions and significant modifications to existing infrastructure.

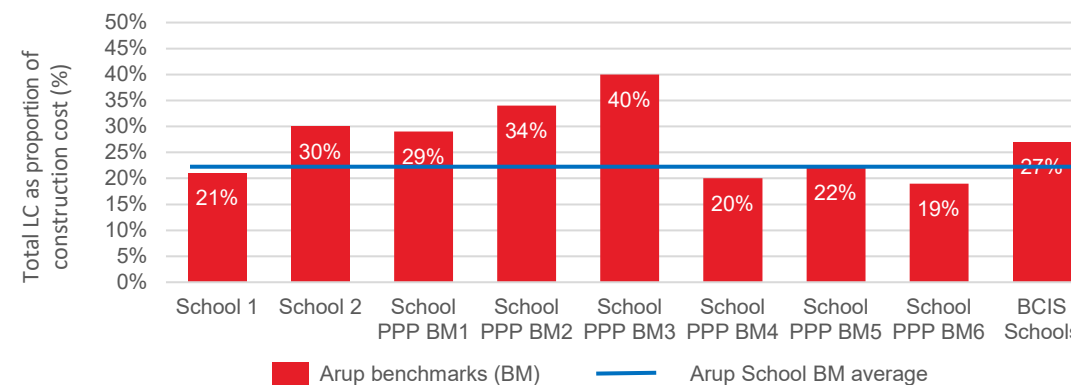
This comparison suggests a figure of 22-25% of capex value of the asset needed investment in the asset over a 25-year lifecycle period to maintain its performance. This can be considered comparable for the arts sector and for arts centres.

We suggest that looking at the cumulative current venue value reported by the FAC against this figure would suggest the level of reinvestment necessary over the coming 25-year period, adjusting for the expected inflation in construction costs over the period. Further, the [British Construction Information Service](#) anticipates a 17% rise in building construction costs to 2029. Current venue value was chosen over construction cost partly due to gaps in the sample data and partly due to the significant variation in age of building stock. Page 11 illustrates the scale of investment this methodology would suggest.



Comparison of Hospital Project cost as a proportion of capex against Arup benchmarks

Source: Arup analysis



Comparison of School Project cost as a proportion of capex against Arup benchmarks

Source: Arup analysis

1. A Way to Consider Lifecycle Costs

1.3 Lifecycle Capital Reinvestment Costs as a Proportion of Floor Area

The British Construction Information Service (BCIS) affords us another way to consider the question.

BCIS have published Lifecycle Costs by type of facility, which includes Concert halls and Theatres. These numbers are expressed as an annual cost per 100 square meters of Gross Internal Floor Area (GIFA).

While we recognise that concert halls and theatres, as typologies, have differentiating characteristics, it is also true that within those categories there are significant differences from size, sophistication of performance environment characteristics as well as complexities due to combining multiple venues that may not be as well captured when comparing floor area, alone.

BCIS Lifecycle Costs - Results								
Price basis:			Price level at 1Q2025 and UK mean location (BCIS estimate)					
Downloaded:			26-Feb-2025 12:02					
Name	Renew			Maintain		Operate		Total
	Fabric	Services	Decoration	Fabric	Services	Cleaning	Utilities	
Concert halls	£883	£750	£425	£476	£1,393	£2,980	£5,145	£12,052
Theatres	£850	£657	£425	£457	£1,219	£2,709	£5,145	£11,462
Cinemas	£918	£750	£425	£493	£1,393	£2,926	£5,439	£12,344
Museums, planetaria	£815	£750	£372	£439	£1,393	£2,546	£4,067	£10,382
Art galleries, facilities for special displays	£850	£788	£372	£457	£1,463	£2,438	£4,410	£10,778
Costs expressed as annual cost (£) / 100 square meters of accommodation.								
Table summarising BCIS Lifecycle costs of maintenance in £s, measured by annual cost per 100 square meters This is broken into 3 categories: Renew, Maintain and Operate, of which we are focusing on the first 2.								

= indicates use in our analysis

1. A Way to Consider Lifecycle Costs

1.4 Testing the Approach

We tested the two methodologies by working them through using data from the Future Arts Centres survey responses.

Based on these methodologies the total costs of annual maintenance for the surveyed arts centres can be estimated to be between £111,000 - £157,500 per venue on average - based on a small scale of organisations represented in the respondent pool. It is notable that a significant portion of the pool reported a current property value of under £1,000,000 and therefore the annual maintenance value is expected to fluctuate significantly with a broader pool of arts centres.

This average annual maintenance allocation is obtained through a top-down approach applying two different methodologies:

- Based on the assumption that maintenance costs can be estimated as a proportion of building capex
- Based on the assumption that maintenance costs can be calculated using an estimate of total cost per square meter of floorspace

The following slides outline limitations to the approach and additional factors that influence the scale of investment required to achieve a meaningful impact for arts centres.

	Lifecycle capital reinvestment costs as a proportion of capex	Lifecycle capital reinvestment costs as a proportion of floor area
Inputs	Total current value: £520 million 25% of total current value: £130 million	Total floor size (m2): 160,000 Estimated BICS maintenance costs (Concert Halls): £3927 Estimated BICS maintenance costs (Theatres): £3608
Data response rate	33 out of 90 respondents were able to provide current value.	52 out of 90 respondents were able to provide Footprint in m2.
Method	Taking 22-25% of the total current value of venues, then dividing that by the number of venues who responded provides a range of likely annual investment costs.	Multiplying the m2 footprint of the venue by maintenance cost to get a total estimated maintenance cost, then dividing this by the number of venues who responded.
Lifecycle Outputs	Estimated lifetime maintenance costs as a proportion of capex, 22% - 25%: £3.47 million - £3.94 million	Estimated lifetime maintenance costs range (Theatres, Concert Halls): £2.77 million - £3 million
Annual outputs	Estimated annual maintenance costs as a proportion of capex, 22% - 25%: £139,000 – £157,500	Estimated annual maintenance costs as a proportion of floor area: £111,000 - £121,000

1. A Way to Consider Lifecycle Costs

1.5 Limitations of the Data and Methodologies

There are significant complexities involved in calculating the capital investment needs and maintenance value of art centres, particularly when aggregating data from a survey. Some examples of this complexity are:

- Almost half the survey responders operate in listed buildings, which creates additional complexity and higher costs in maintenance and capital modifications
- There are significant differences in the balance of typology, as the difference in scale, digital technology, purpose and additional facilities all make a difference in terms of maintenance. Smoothed over a large enough data set this can be accounted for but does create challenges for a data set of this size
- The capacity for data collection creates significant challenges, as different understanding of building footprint, poor records of initial capex and uncertain current asset value all contribute to creating additional complexity in these calculations

As such, the figures provided here should be used as a reference of the order of magnitude only, and as a potential methodology for future calculations, with a more complete data set.



The Met Venue © Jim Stephenson

1. A Way to Consider Lifecycle Costs

1.6 Summary

We believe that this approach is a meaningful methodology for attempting to answer this question. Analysing percentage of CAPEX encompasses a considerations of risk in a more significant way. The approach also highlights the different factors within these questions, including maintenance and renewal costs.

The estimated range of average figures, between £111,000 - £157,500 per arts centre per annum, is felt to be credible given the scale of organisations represented in the pool, with many respondents reporting a current building value of less than £1,000,000. It is appropriate to highlight a range of figures and in the following section we explore additional considerations to guide where in and above the range an appropriate level of investment might fall.

We stress that further analysis is required to establish the full requirements of the sector nationally.



An Lanntair building © Future Arts Centres

2. Keeping Up with Maintenance

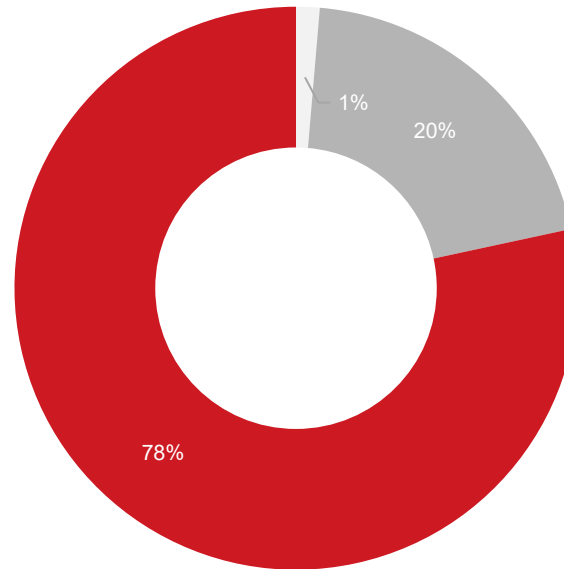
The survey responses from Future Arts Centre members reveal more details about the current state of the UK arts centres' buildings, and additional considerations that therefore arise when trying to understand the scale of investment needed

2. Keeping Up with Maintenance

As part of the survey, respondents were asked their sentiment on whether they are on track or behind in maintenance.

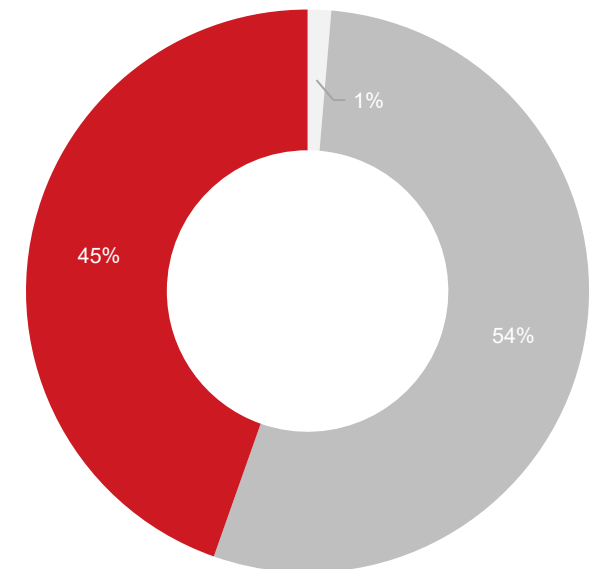
The data demonstrates, **78% of respondents felt that they were behind schedule** on planned significant maintenance, compared to only 45% who thought they were behind schedule on standard operational maintenance.

For the purposes of this survey, we defined planned operational maintenance as day-to-day or regular maintenance that operations require consistently, as opposed to bigger upgrades including end-of-life replacements and lifecycle capital reinvestment.



- We are ahead of schedule with planned significant project maintenance
- We are on track with planned significant project maintenance
- We are behind schedule on planned significant project maintenance

Is your venue on track for significant project maintenance?



- We are ahead of schedule with planned standard operational maintenance
- We are on track with planned standard operational maintenance
- We are behind schedule with planned standard operational maintenance

Is your venue on track for standard operational maintenance?

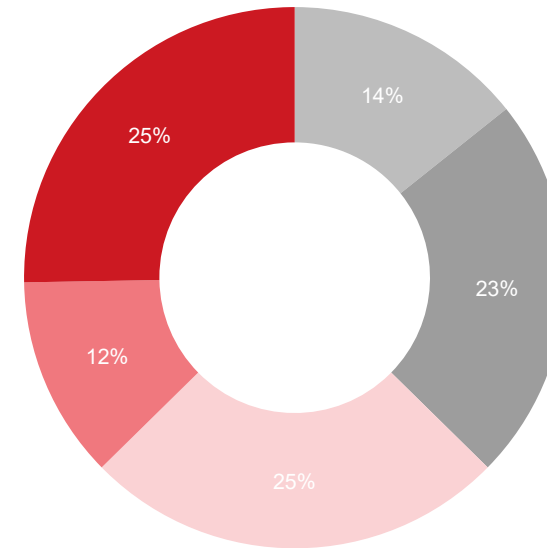
2. Keeping Up with Maintenance

2.1 The State of Maintenance over the Last 10 Years

Approximately a quarter of the venues who responded to this question had not had any kind of renovation or maintenance carried out within recent memory, suggesting the lack of investment in the long-term maintenance of the venue.

On top of this, a further 37% of arts centres have not undertaken major renovation or refurbishment within the last 10 years. This means that over 60% of arts centres have not had major renovation or refurbishment for over 10 years, further reinforcing the challenge to maintenance faced by the venues.

Within the responding group, only 14% have had major renovations in the last decade, which corresponds with the perceived challenges in undertaking significant project maintenance as demonstrated by the last slide.



- Yes - major renovation to buildings within the last 10 years
- Yes - significant refurbishment to equipment, buildings or site within the last 10 years
- Yes - major renovation to buildings 10+ years ago
- Yes - significant refurbishment to equipment, buildings or site 10+ years ago
- No - no major renovations or refurbishment

Has the facility undergone major renovation or refurbishment?

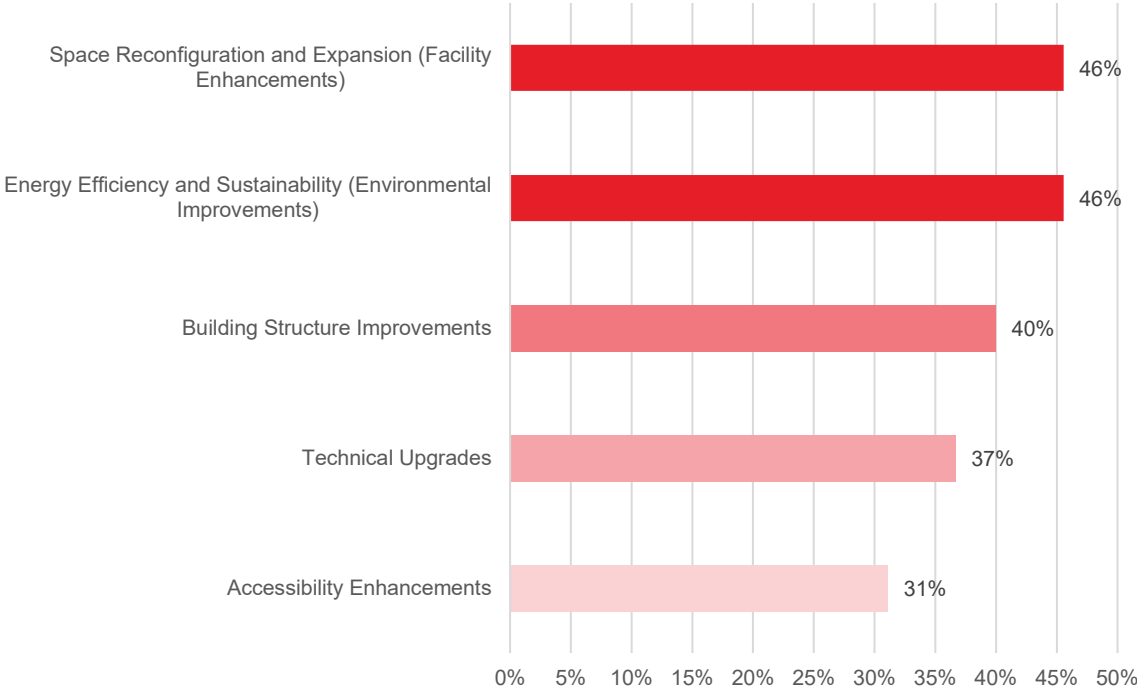
2. Keeping Up with Maintenance

2.2 Strategic Priorities of Venues for Future Investment

When asked to provide a qualitative response on the key strategic priorities for future investment, the respondents gave a wide variety of infrastructure improvements. These were then categorised into five main themes, with a significant number of responses crossing multiple themes. These are:

- Space Reconfiguration and Expansion (Facility Enhancements)
- Technical Upgrades
- Energy Efficiency and Sustainability (Environment Improvements)
- Accessibility Enhancements
- Building Structure Improvements

When looking at the proportion of venues who identified certain themes, the two most common were Space Reconfiguration and Expansion, and Energy Efficiency and Sustainability. The least often identified were Accessibility Enhancements, which may be influenced by many respondents already having some accessibility features in place.



Percentage of venues who identified each theme as a key strategic priority

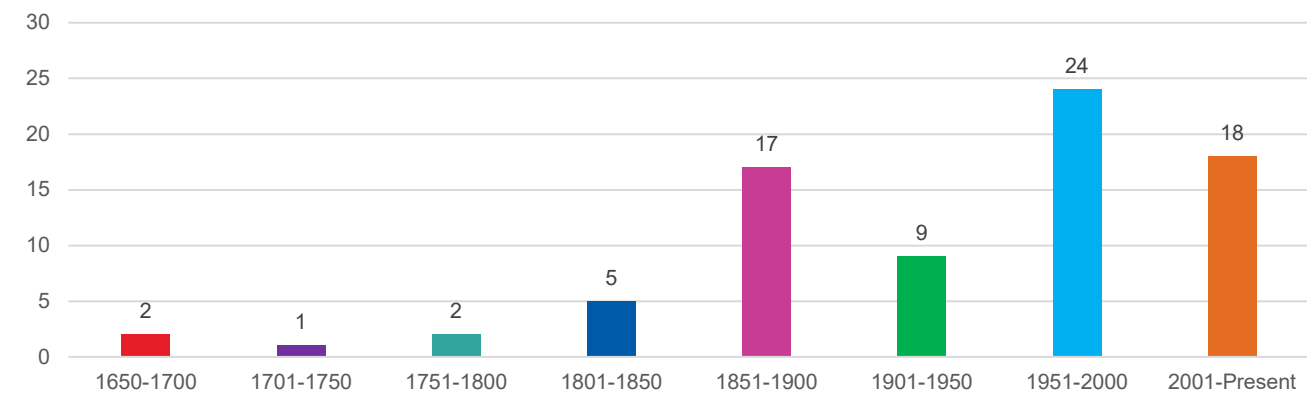
2. Keeping Up with Maintenance

2.3 Venue Maintenance vs Venue Age

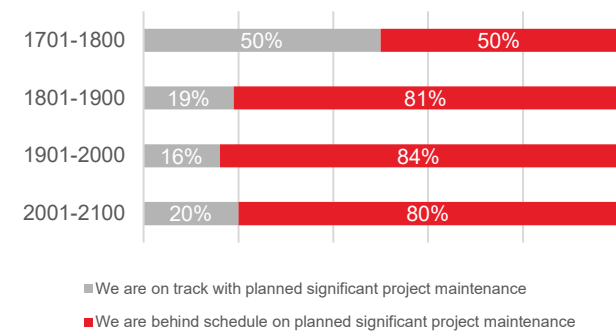
The age of arts centre varies considerably, spanning the last 400 years, with a third of respondents' buildings constructed prior to 1900. Almost half of the survey responses represented buildings with listed features, indicating the influence of heritage considerations in building maintenance.

Art centres dated between 1801-1900 showed the largest delay in maintenance, with only 38% of them feeling on track with planned standard operational maintenance. 63% of responding arts centres in buildings constructed between 1901-2000 felt they were on track with operational maintenance, and 56% of those built in 2000s. Across-the-board venues have a sense that they are struggling to keep up with significant project maintenance, as for three of the time periods 20% or less of the venues are on track. This suggests that maintenance requiring a more significant investment of time, resources or impact on operations is challenging regardless of the age of the building.

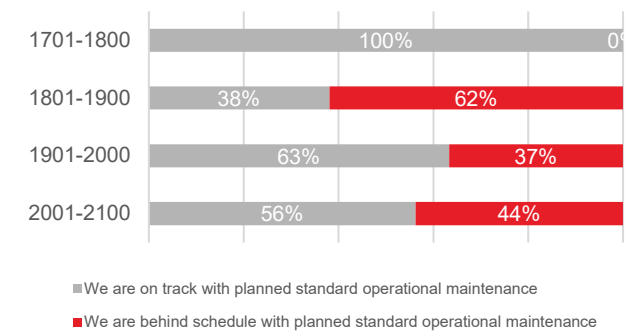
For those venues built between 1701 and 1800, only 2 venues responded to the question. A larger data pool is needed to better understand the needs of organisations operating in buildings of this age.



Distribution of ages of arts venues



Year art centres were built mapped against significant maintenance



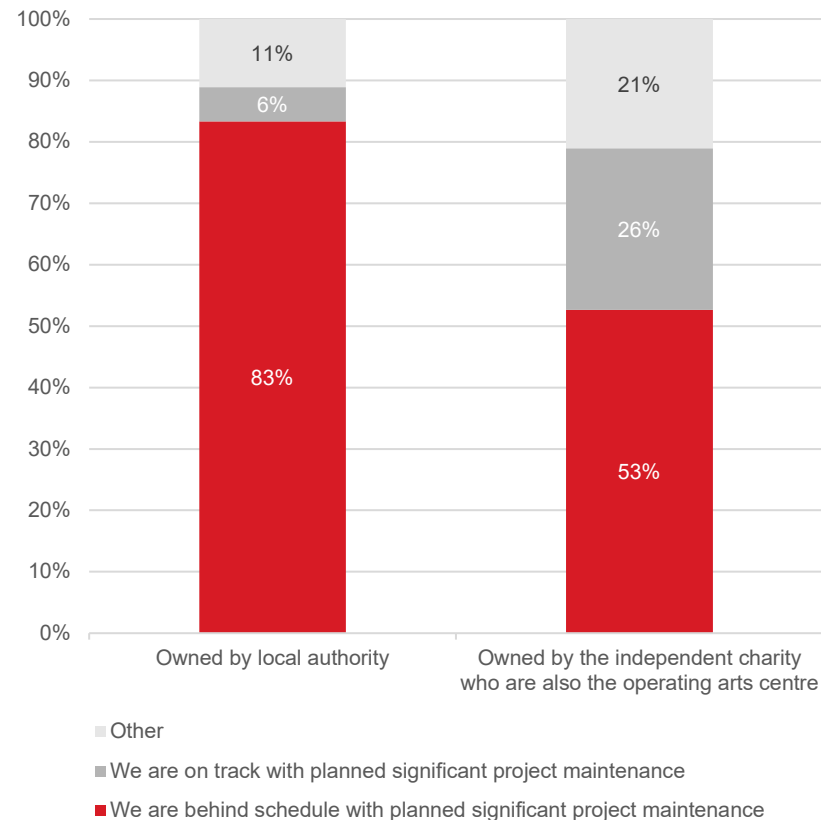
Year art centres were built mapped against operational maintenance

2. Keeping Up with Maintenance

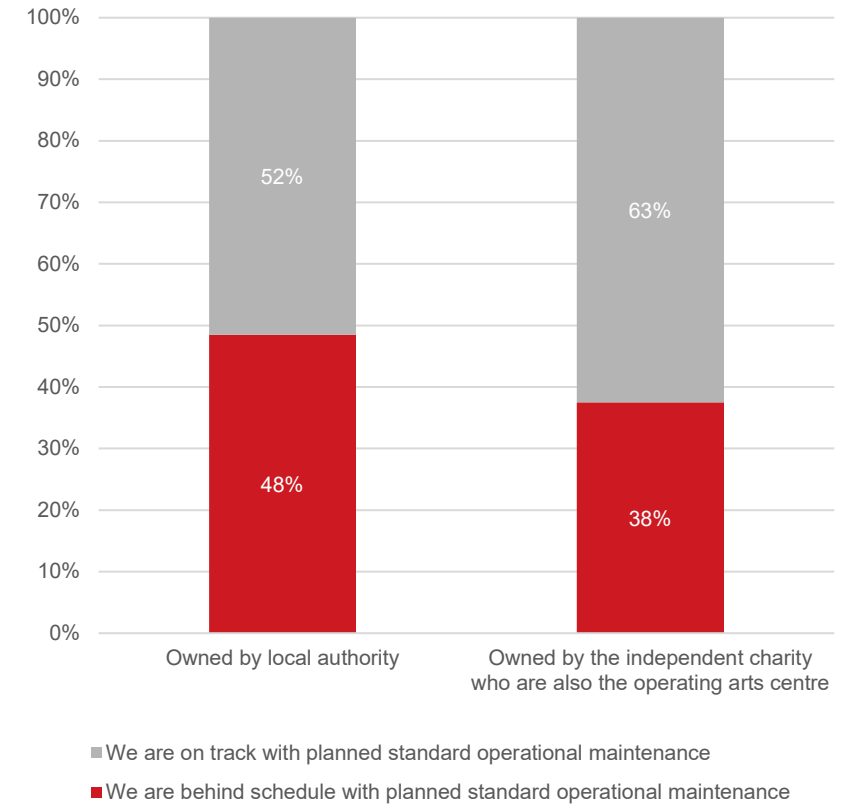
2.4 Building Ownership and Management

There is a correlation between the challenges with staying on track with significant project maintenance, versus ownership of the venue. For both standard operational and significant project maintenance, **venues owned by local authorities are more likely to report perceiving that they are behind schedule** than those owned by independent charities.

The challenge is even more pronounced with Significant Project maintenance, as 83% of venues owned by local authorities report a perception of being behind schedule with these, compared to the (still high) 53% of those owned by independent charities.



Ownership against planned significant project maintenance



Ownership against planned standard operational maintenance

2. Keeping Up with Maintenance

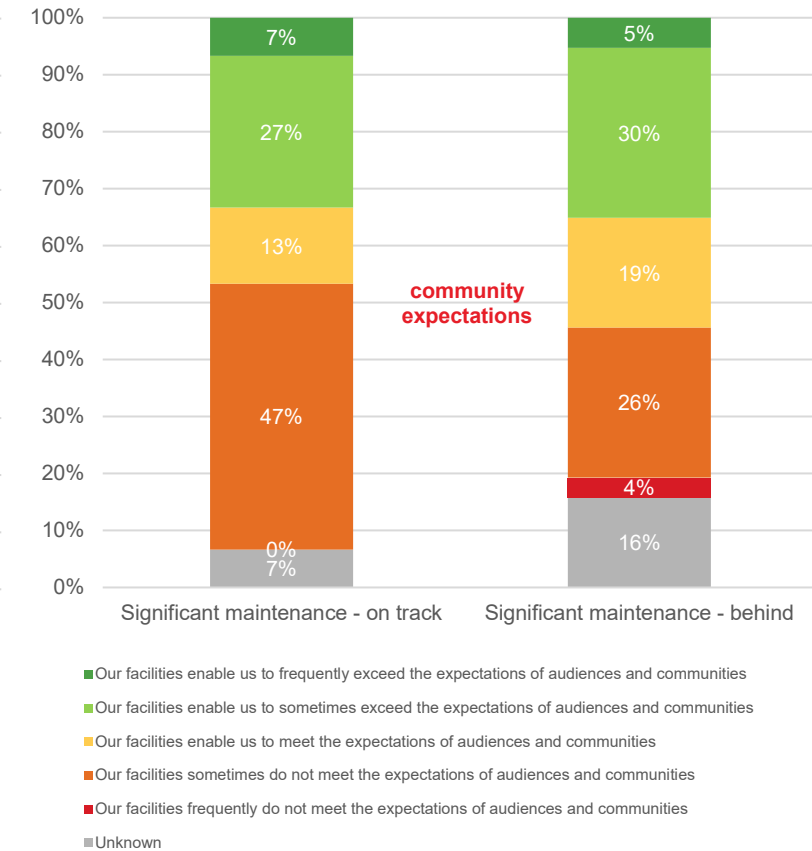
2.5 State of Significant Project Maintenance and Ability to Meet Expectations

The challenges facing operators are shown in the data comparing maintenance of significant projects and the expectations of artists and communities respectively.

For venues who report believing that they are on track with significant maintenance projects, anecdotal feedback suggested that 40% sometimes do not meet artist expectations and 47% sometimes fall short of expectations from audiences and communities.



Significant project maintenance against artist's expectations



Significant project maintenance against community's expectations

2. Keeping Up with Maintenance

2.6 State of Regular Operational Maintenance and Ability to Meet Expectations

When looking at operational maintenance in comparison to significant project maintenance on the previous slide, there is a clearer link between reporting a perception of running behind on operational maintenance and being unable to meet the expectations of artists to some extent.

39% of venues reporting feeling behind on operational maintenance either frequently or sometimes did not meet expectations, compared to 28% for venues reporting being on track with operational maintenance.

There is a less pronounced difference in meeting community expectations, but in both cases a third of arts centres who responded indicated sometimes or frequently failing to meet the expectations of their audiences and communities.



2. Keeping Up with Maintenance

2.7 Summary

In summary:

- 78% of respondents felt that they were behind schedule on planned significant project maintenance
- Less than half of survey respondents have undertaken a significant refurbishment in the last 10 years
- There is a broad range of needs identified, with the two most common being Space Reconfiguration and Expansion, and Energy Efficiency and Sustainability
- Generally, the age of the building correlates negatively with their ability to conduct operational maintenance
- Across the board venues are struggling to keep up with significant maintenance
- Challenges in completing operational maintenance correlate with challenges to meet artist expectations

We therefore recommend that decisions on investment tend towards awarding the upper end of a potential range.



Bluecoat Venue - photo © Brian Roberts

3. What is the Industry Facing?

In a post-pandemic world, the industry faces continued challenges as the expectations of audiences change more rapidly. What implications does this have on the way the built environment may need to change to better support the organisations' ability to positively impact their communities?

3. What is the Industry Facing?

3.1 Longer-term Transformation

Present and future trends will create significant additional investment drivers

Sustainable

The 2022 Future of Arts and Culture survey indicates that arts organisations around the world consider that Environmental Sustainability to be the number one driver of change in the industry.

Consciousness of the impact of the industry is leading to changes from production processes to artistic programming, and from design and construction considerations to organisations looking critically at how they engage with the global climate crisis.

Our survey data indicates that respondents are working to pursue energy self-sufficiency, shortening supply chains and reducing dependency risk in their operations.

Leveraging the opportunities of digital technology in efficient building management and resource management more broadly will become the norm, potentially impacting the ability of arts centres to be seen as exemplars of the ethos and expectation of communities if they lag behind.

Inclusive and safe

Cultural centres are a safe place for many, a centre of gravity of their communities. As a whole the sector aims to respond to a changing societal awareness in the way they engage with their community and through their programming. However, for many, the facilities themselves often present a less inclusive attitude. As both actual demographics and the perceived intended audiences of these spaces change, what it means to meaningfully reflect and welcome these identities will require more from arts spaces.

Wider awareness and understanding of accessibility and inclusion will continue to influence demands on space. The increasing recognition of neurodiversity is manifesting in design outcomes, such as quiet spaces and adjustable lighting conditions.

The rise of demand for third space in public spaces offers a huge opportunity for arts centres to activate more of their facilities for larger periods of the day to attract engagement from a broader spectrum of the community in need of space for discourse and social exchange, meetings, and creative activity.

Leverage evolving technology and meet expectations

Evolving expectations of artists and performers are driven by technological advances, among many factors. Accessing space to record self-tapes, conduct R&Ds, record demos and hold meetings are some of the functions that arts and culture buildings are increasingly being looked to meet.

Significant work is underway in the UK to better understand the implications and opportunities of evolving audience expectations of the arts, particularly through COSTAR's research. Multi-screen engagement and digital performance assets are two clear early trends that are likely to require enhancements to in-venue technology.

The breadth of technologies and formats that may require to be accommodated when receiving artists and performers is broad and will continue to evolve, as will experiential characteristics such as acoustic enhancements.

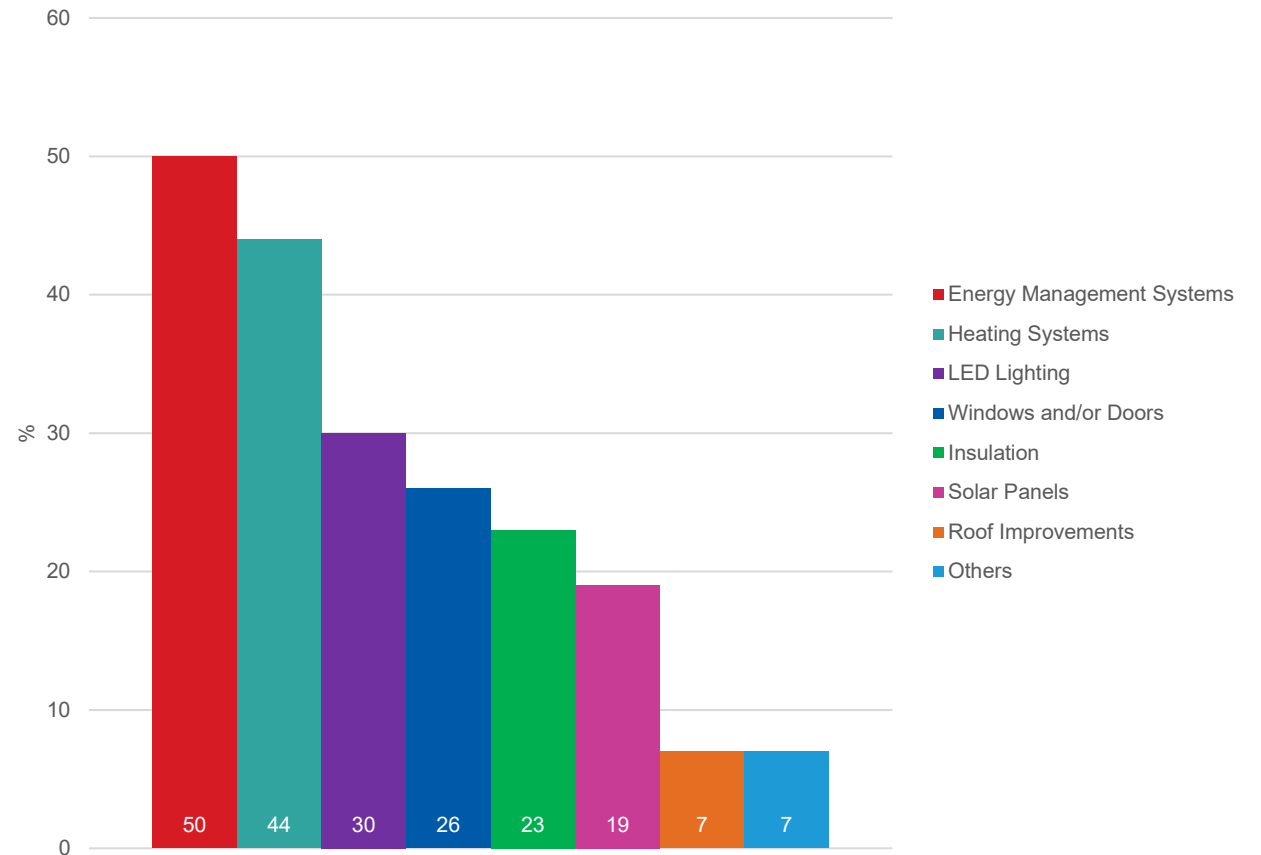
3.2 Insights from the Survey

3.2.1 Environmental Sustainability

When asked about prioritised needs to improve environmental sustainability, heating and energy management ranked highest. Heating systems were the most popular top priority, at 26% of responses followed by energy management systems at 23%. These figures changed to 16% and 25% respectively by the third priority choice. Across the second and third choice the range of answers became more mixed.

Overall, the prioritisation of heating, insulation and energy generation in this open-text question indicates a trend to achieve greater environmental resilience through self-sufficiency, and potentially operational efficiencies that could be created through anticipated cost savings.

Improvements to roofs, windows and doors ranked increasingly highly in the second and third prioritised categories. Outliers in the data included biodiversity management in gardens, waste management and improvements to drainage.



Overview for Environmental priority or need
Figures indicate number of selections per category

4. Future of Arts and Culture Survey

In order to understand what capital investment would be necessary in the UK, beyond maintaining and upgrading existing facilities, we recommend a gap analysis be undertaken. Such an analysis was beyond the scope of this high-level study.

Beyond a gap analysis, consideration should also be taken regarding the future needs of the industry and our communities as they face new challenges.

For this reason, we have taken the opportunity to include key insights from the initial round of the Future of Arts & Culture Research undertaken by Arup and Therme Group in 2021. In this endeavour, a wide range of arts professionals across both performing and visual arts sectors were engaged in a dynamic online survey engine, in which questions evolved as the responses grew.

Likened to a global conversation, the insights from this review have led to further conversations and face to face meetings around the world. These conversations will lead to a next round of global engagement expected later this year.

4. Future of Arts and Culture Survey

The Future of Arts and Culture research was conducted in 2021 through a collaboration between Arup, Therme Group, Annette Meys and Honor Hargar, conducted by Changist. Highlights from the original findings are included in Appendix A.

The research highlighted significant potential changes in global, macro-economic trends impacting the arts and culture sector:

- Climate change was considered the most significant driver of change and the implication that the risk of the arts and culture may take a back seat as a social and economic priority due to shifting political attention, social disruption and funding re-allocation
- The potential for changes to business models prioritising more clearly defined and starker choices of model was articulated. This could pose the risk of not recognising the multi-layered or intangible value small to mid-sized organisations create for communities and emerging and mid-career artists
- Three possible future scenarios were articulated based on the trends. They highlight the future importance of serving communities and maintaining clear organisational purposes for small and medium arts organisations to be able to thrive.
- These scenarios point to future questions that policy makers may face when investing in arts centres – do we want them to be the same or different? How should local identities be manifested? Should there be different centres of excellence for different parts of the country? What will guide the prioritisation of investment?

Three potential scenarios emerged from the research.

Scenario 1 – Spectaculars and Small Stages

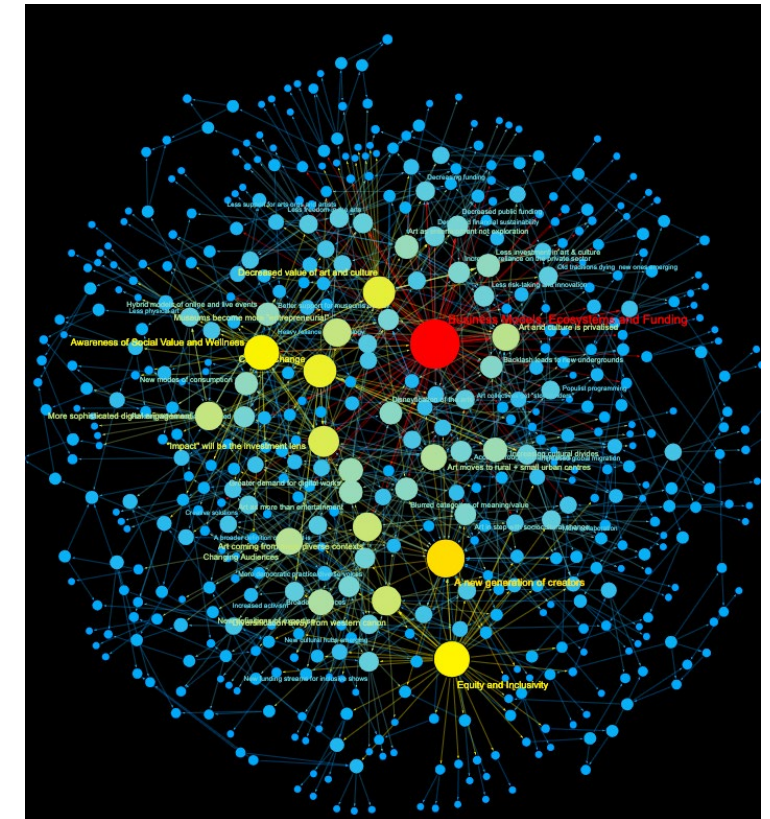
- If funding pressures were to push arts organisations to either adopt media and entertainment business models as their modes of delivery or deliver hyper-locally, how would local communities be able to gather? What would it take for arts centres to be able to deliver in this way and what would be gained and lost in asking them to do so?

Scenario 2 – Global Network of Communities

- In the event that the main source of resilience and success of arts organisations is their ability to serve local and regional communities, what demands will be placed on the buildings? Are they ready to support a broader diversity of audiences, themes and artforms?

Scenario 3 – Platforms and Multiverses

- This scenario explored a significant rise in online delivery. If audiences moved significantly towards digital platforms and tools to engage with the arts, what would the role of arts centres be?



Future of Arts and Culture visualisation of all trends and drivers
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Conclusion

Conclusion

This report highlights a range of figures to support identifying a scale of investment in capital works. The methodology used to identify this range is meaningful and through the comparison of two different types of analysis – proportion of CAPEX and BCIS benchmarking - we have been able to create a meta-range. The scale of organisations represented in our data pool skews the range. The next step, noting the quantum of work and challenges inherent in gathering data, is to extrapolate this method across national assets. We would be pleased to continue this work if the figures can be provided.

Requirements are further increased by the complexities inherent in the multipurpose nature of cultural buildings and their offerings and this should be taken into account when estimating an appropriate investment figure. The length of time over which organisations have not conducted refurbishment and the perception of tracking behind schedule particularly suggest the need to address both historic challenges and a sustainable future.

Finally, through exploring the broader trends impacting the industry and taking learnings from the global sector via the Future of Arts and Culture research, we can see that in the future policy makers will be asked to make nuanced choices about future investments and prioritisation that should be guided by the community needs, local identity and purpose of arts and culture buildings.



artsdepot activity © artsdepot

Appendix A

Insights from the Future of Arts and Culture industry probe 2022

Future of Arts and Culture

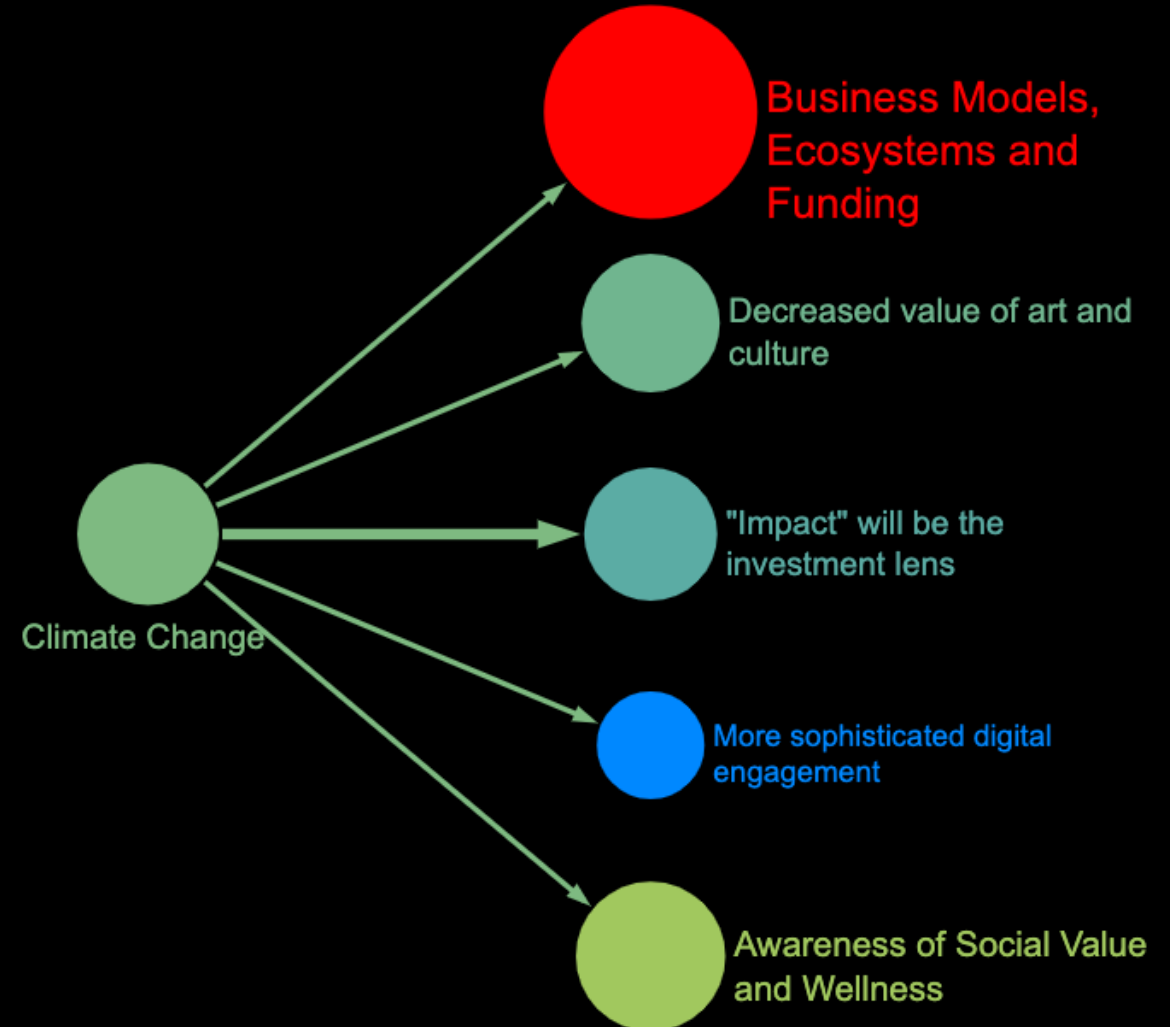
Climate change as a universal driver



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

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

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



Future of Arts and Culture

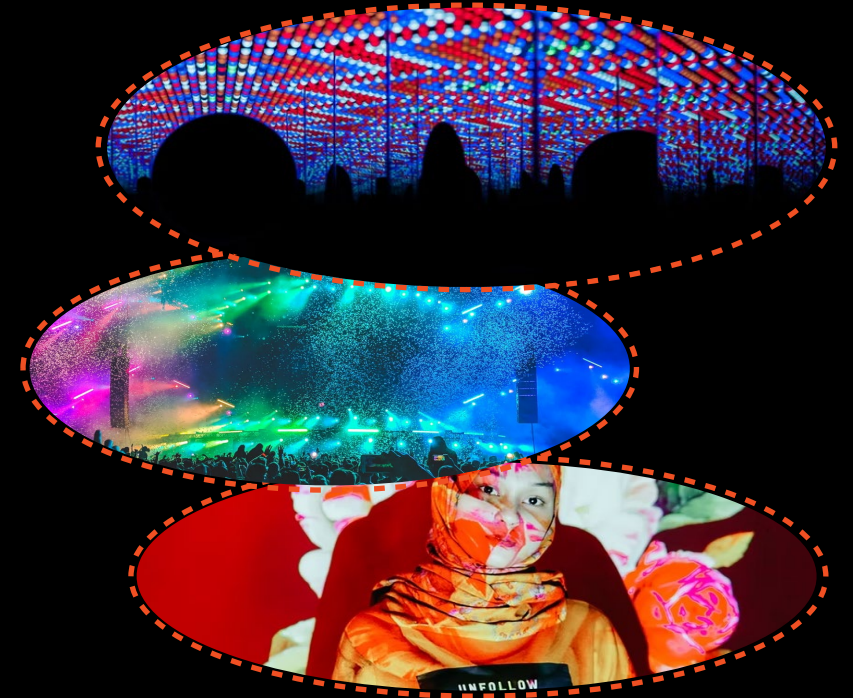
About the Scenarios



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

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

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





Scenario 1: Spectaculars and Small Stages

Future of Arts and Culture

Scenario 1: Spectaculars and Small Stages

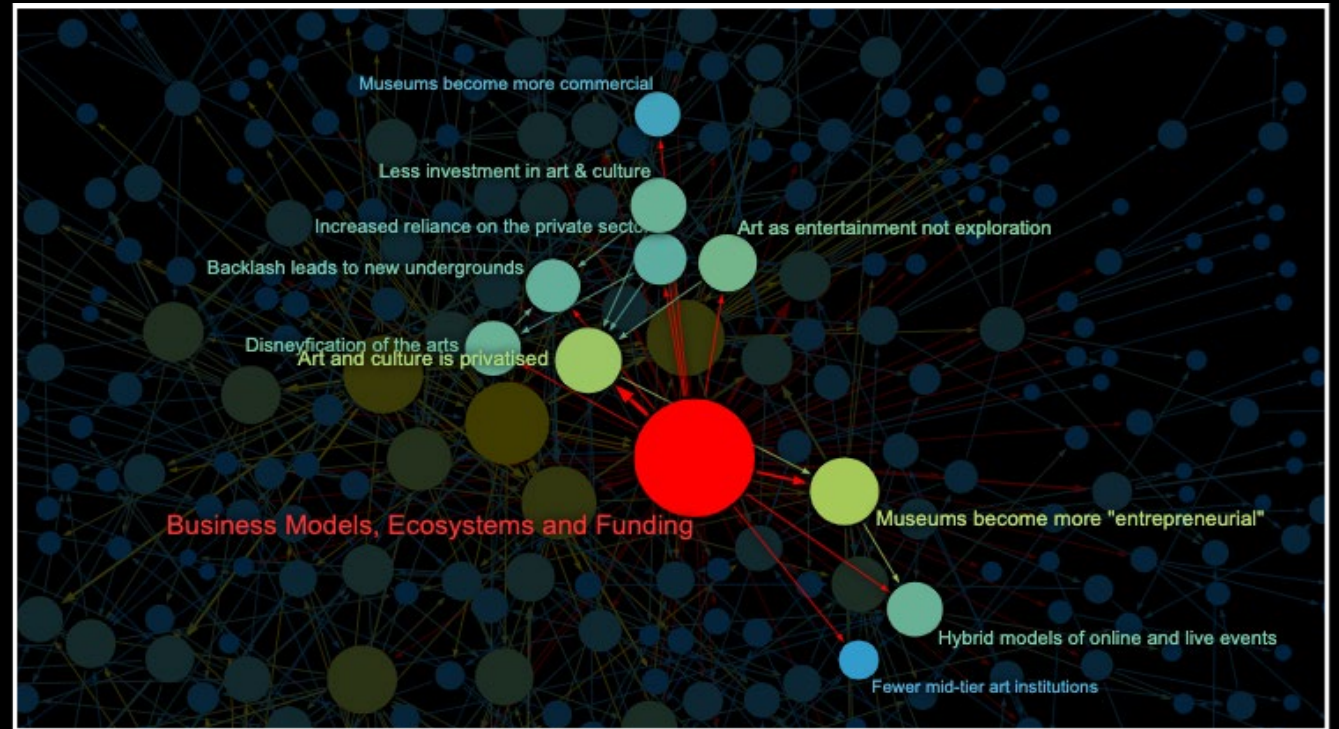


With growing uncertainty around the sources of financial support they've traditionally relied on, arts and culture organisations focus on business models and the need for stable funding.

In this future, making an impact means generating a positive bottom line first and foremost.

Profitability is the key imperative, pushing arts and culture ever further toward the dynamics of media and entertainment.

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



Scenario 2: Global Network of Communities



Future of Arts and Culture

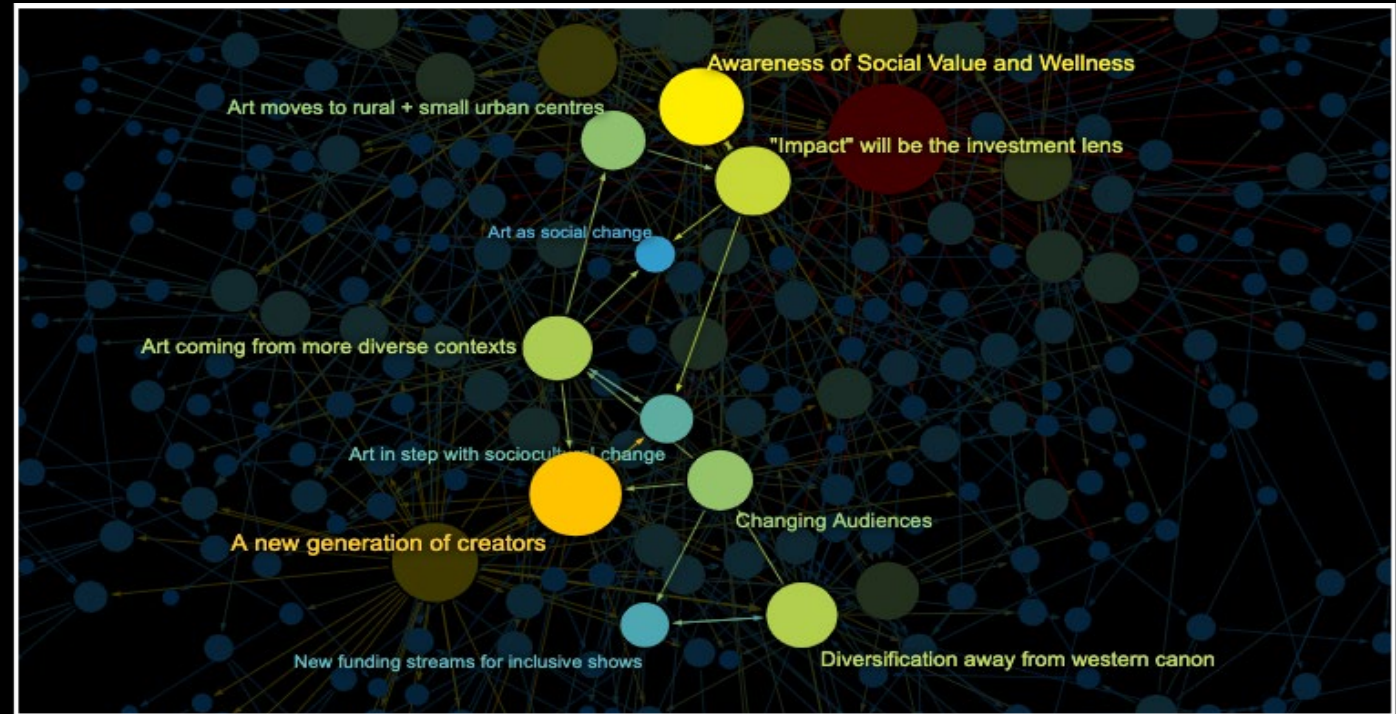
Scenario 2: Global Network of Communities



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

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

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





Scenario 3: Platforms and Multiverses

Future of Arts and Culture

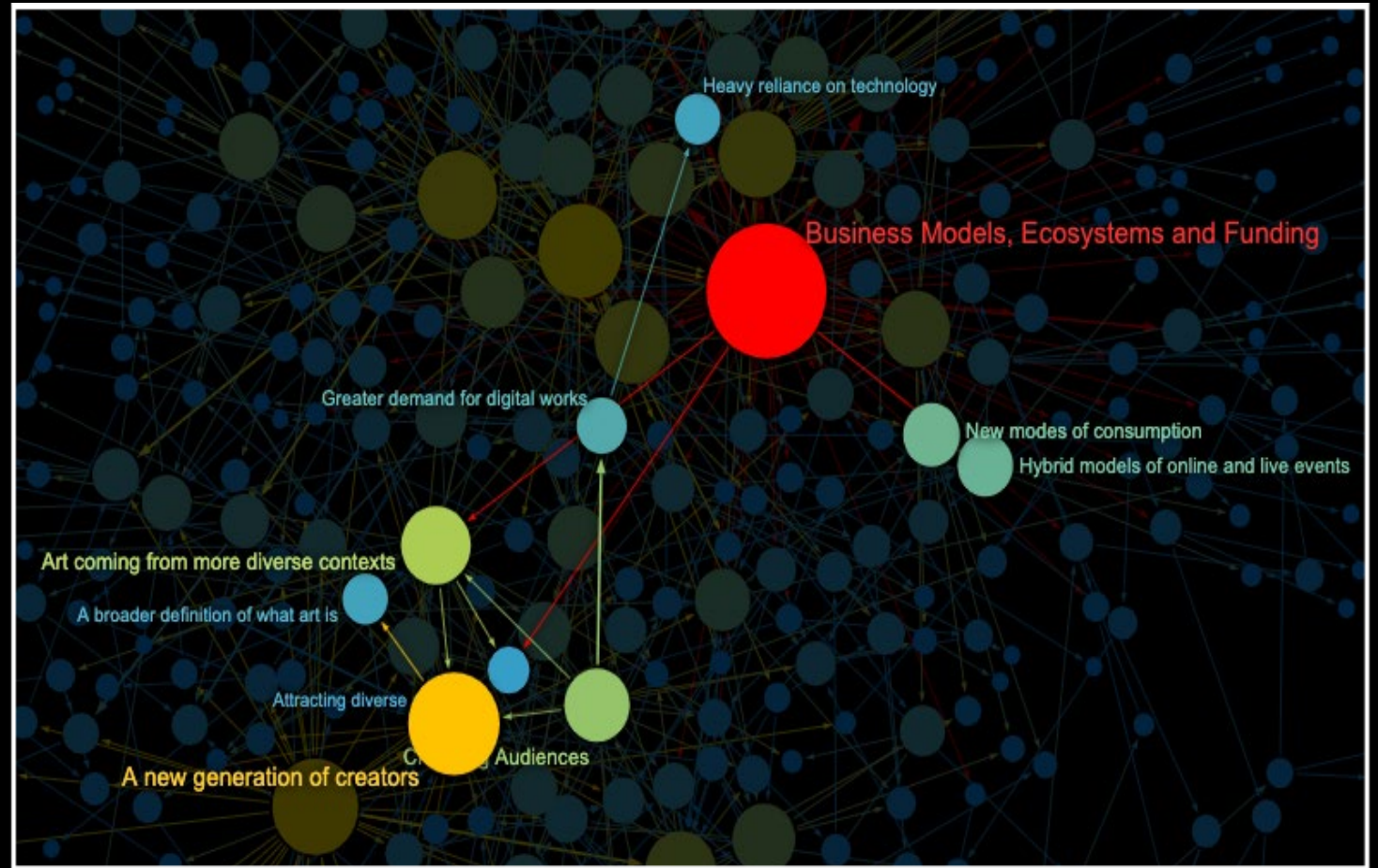
Scenario 3: Platforms and Multiverses



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

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

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



Appendix B

About Future Arts Centres

Future Arts Centres

Future Arts Centres is a UK network that champions the unique importance of arts centres at a local, regional and national level.

The network advocates that, by offering outstanding artistic experiences for everyone in our communities and by operating as robust social enterprises, arts centres present a fantastic model for the cultural venues of tomorrow.

The strength of Future Arts Centres lies in the diversity of its membership and its foundations are in peer-support; it brings together leaders from over 160 arts centres to engage in action learning, to share best practice and to develop innovative business models. They also provide annual research and resources, such as salary benchmarking.

Arts centres vary in scale, but typically share the characteristics of being multi-artform, public-facing buildings with strong participatory programmes and relationships with their local communities.



Stanley Arts © Glen Foster

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**Future
Arts
Centres** •
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