

# Recovery... or Transformation?

***RO.ME***

26 November 2020

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**AMS**  
P L A N N I N G  
& R E S E A R C H



**When the tide goes out,  
you see the rocks that were  
already there**



## Readiness

- Build on engagement
- Gather data
- explore new scenarios

## Recapitalization

- New value proposition
- New business models
- New partnerships.

## Resilience

- Stay engaged and connected.
- Focus on purpose.
- Challenge assumptions.

## Reimagination

- Design and implement a different future.

## Return

- Scale up
- Meet our communities where they are
- Over time.

# Culture is essential in economic terms, both at home and internationally.

*Tourism contributed 5.7% of Italy's Gross Domestic Product in 2019, representing over 1.5 million jobs.*

*International tourism had been steadily growing in recent years, to more than 96 million tourists in 2019.*

*There were almost 65 million domestic arrivals in tourist accommodations in 2018. Nearly 10% of these were in Rome and Milan.*

# Participatory culture will be the core offering – through performance, craft, and food.

*Google searches for “DIY” or “do it yourself” have increased by as much as 500% since 1 January 2020 worldwide.*

*Culinary tourism is forecast to grow almost 17% annually through 2027, reaching a global market value of \$1.7 trillion.*

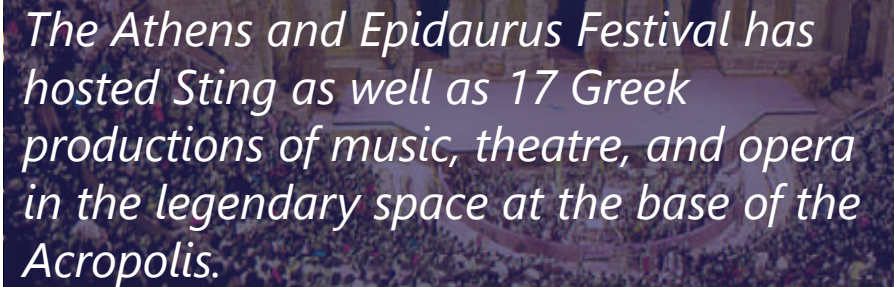
*Social media sharing thrives on hands-on projects, performance, and interaction. TikTok has over 80 million #food videos, and content tagged #withme has over 235 million views.*




**Animating cultural heritage sites is critical.** Doing so will require local leaders to marshal support.



*The Edinburgh International Festival was established in 1947, to "provide a platform for the flowering of the human spirit," together with positive economic impacts on the region.*



*The Athens and Epidaurus Festival has hosted Sting as well as 17 Greek productions of music, theatre, and opera in the legendary space at the base of the Acropolis.*

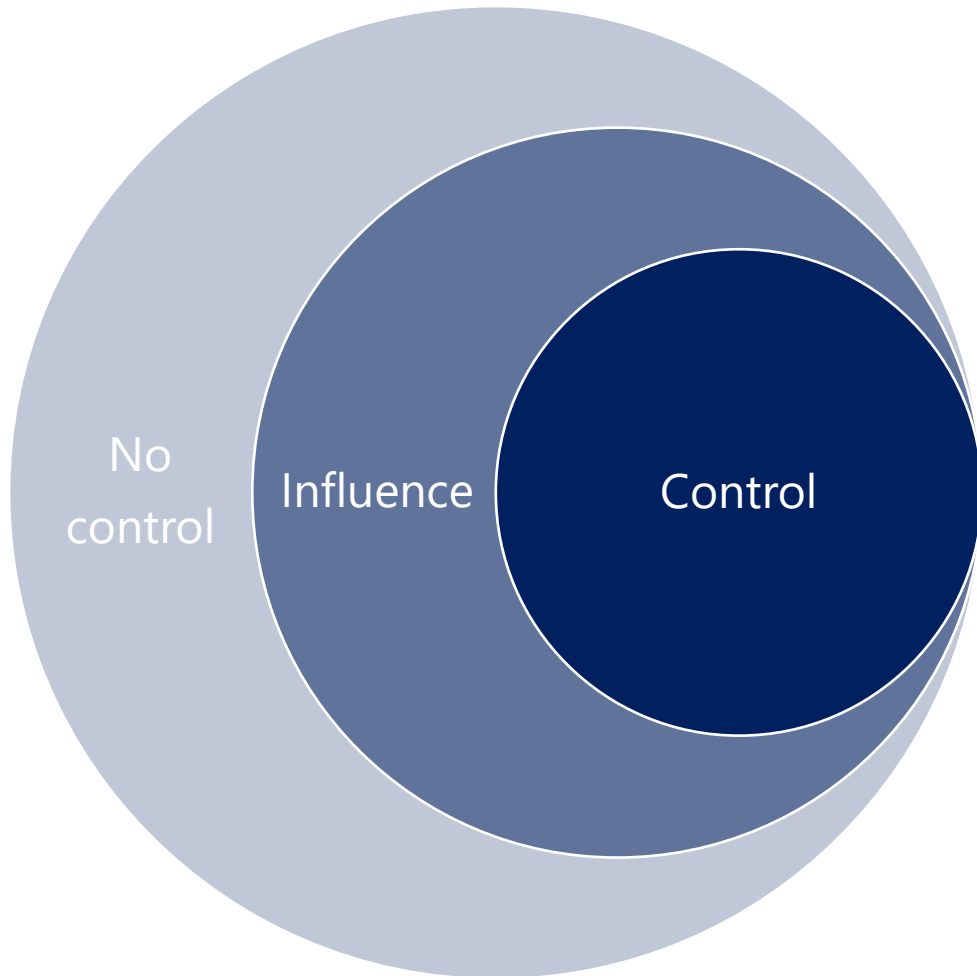


*The Caesarea Amphitheater in Israel is home to a variety of summer concerts and has hosted Bjork and Alanis Morissette.*



**The future will call for  
change**

**We focus on things we can control, while welcoming (or accepting) the things we can't control.**



Building/venue usage  
Organizational branding  
Programming  
Organizational policies  
(Some) hiring

Consumer behavior  
Weather  
Financial markets  
Community health  
Tech sector innovation  
Competitive brands

New work development  
Artist training  
Arts funding  
Institutional partners  
Worker wellbeing  
Union oversight



# Ten years in ten months.

GAMING ENTERTAINMENT TECH

## Fortnite is launching a concert series it hopes will become a 'tour stop' for artists

It starts with Dominic Fike performing on Saturday

By Andrew Webster | Sep 8, 2020, 10:00am EDT

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Oct 13, 2020 7:27p

## Disney's Streaming Reorganization Cheers Investors but Confuses Insiders

By Matt Donnelly, Brent Lang

4



Michael Buckner/Variety



## IBM evolves yet again ... this time into the cloud

Kristin Schwab

Oct 9, 2020



IBM Executive Chairman Ginni Rometty delivers a speech at CES 2019 in Las Vegas The company is pivoting to cloud services. Justin Sullivan/Getty Images



**“... the first casualty of a crisis is imagination. But those that shape and benefit from the future will be those that can imagine it.”**

*Martin Reeves, Boston Consulting Group, April 2020*



# NOW: Temporary or Permanent?

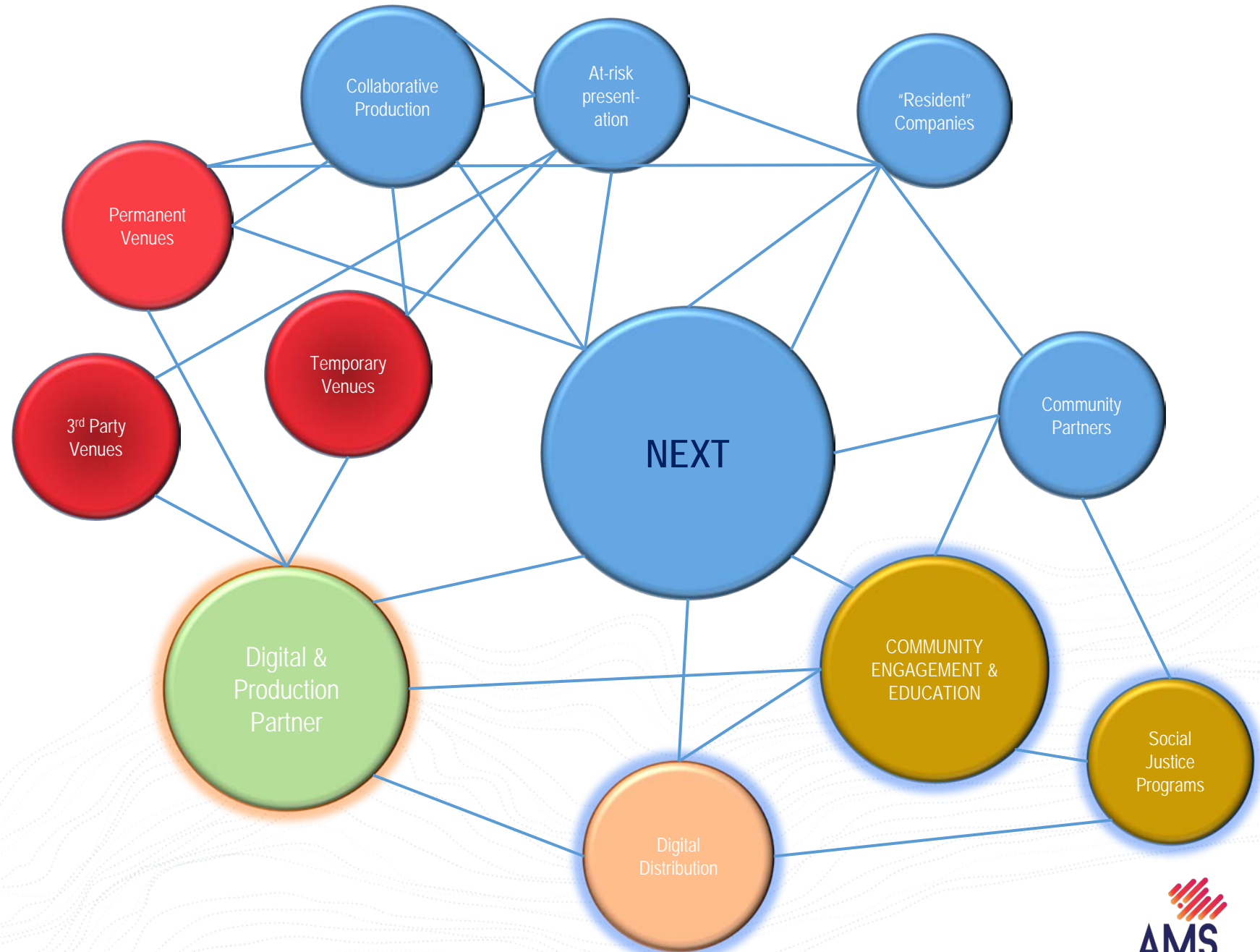
What does this mean for our venues?





# NEXT

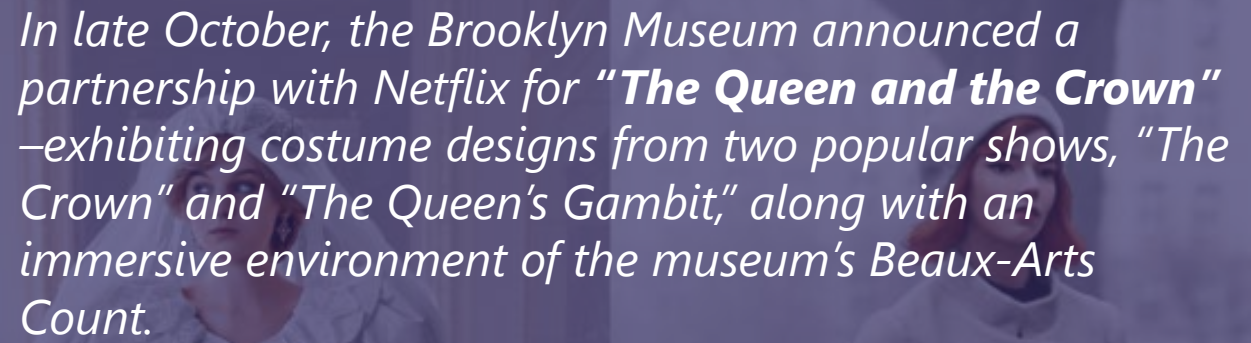
A network –  
broader and  
more deeply  
connected to  
community



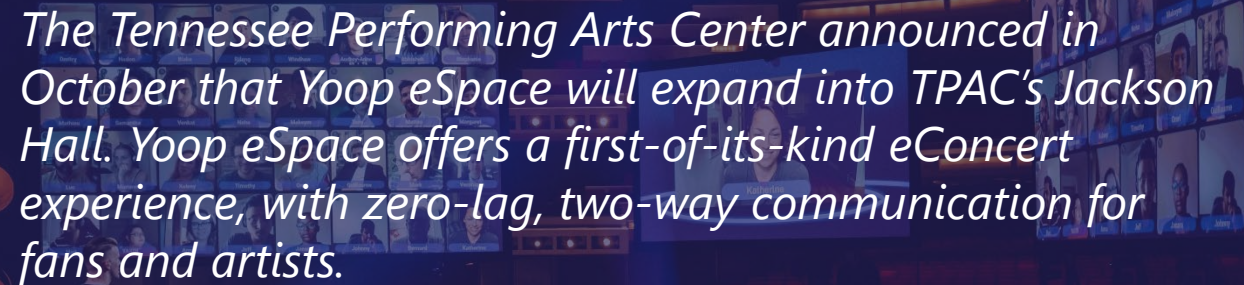


**Virtual  
engagement  
requires new  
competencies.**


**New business  
partnerships  
suggest a path  
forward.**



*In late October, the Brooklyn Museum announced a partnership with Netflix for “**The Queen and the Crown**” –exhibiting costume designs from two popular shows, “The Crown” and “The Queen’s Gambit,” along with an immersive environment of the museum’s Beaux-Arts Count.*



*The Tennessee Performing Arts Center announced in October that Yoop eSpace will expand into TPAC’s Jackson Hall. Yoop eSpace offers a first-of-its-kind eConcert experience, with zero-lag, two-way communication for fans and artists.*



*Entrepreneur Natasha Tsakos’s work represents the convergence of storytelling, big data, and augmented reality (AR), designed to engage audiences both in person and through digital distribution. **Humanode** is built as a cause-based platform.*

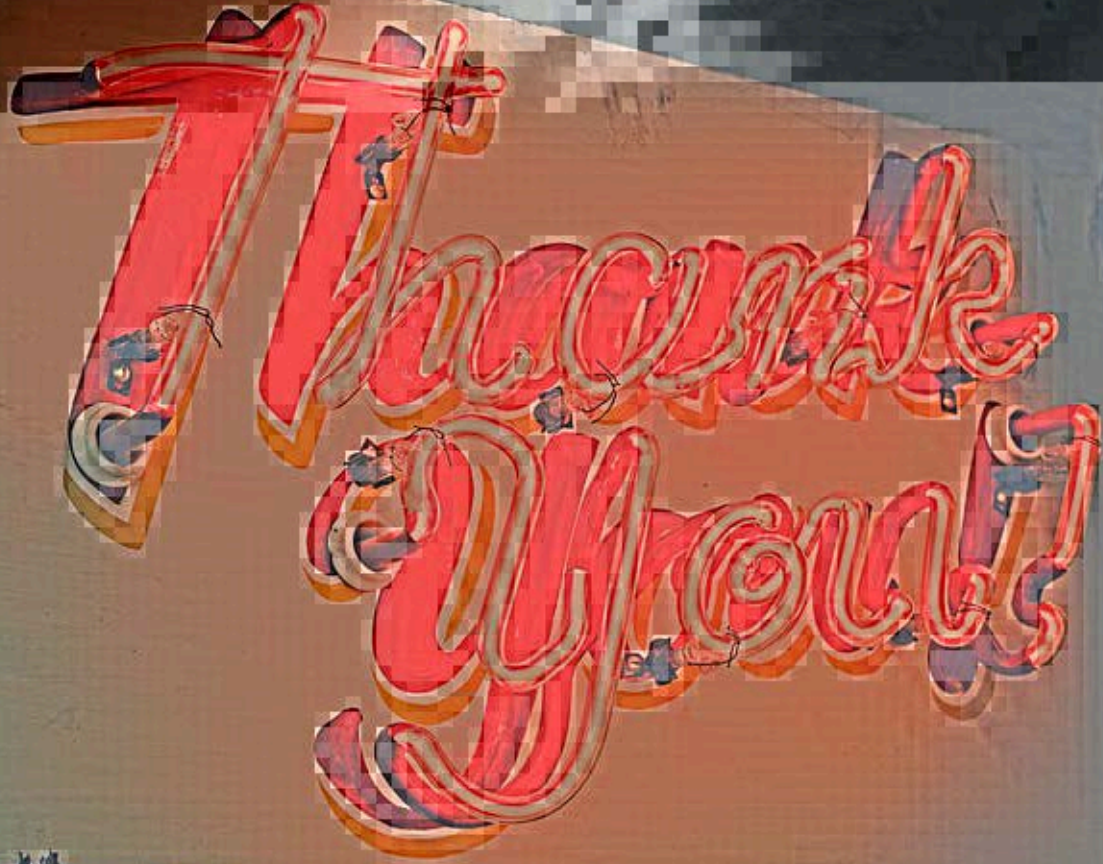
THE LONG RUNWAY

# Readiness to Return

A lot of 'moving parts' have to align







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