

Foresight Research Report: **Expanding Access** **& Changing Demographics**



Document Overview

The following research report structure was based on an adaptation of a common foresight tool: the *Framework Forecast* model developed by Dr. Peter Bishop, Chair of the *Studies of the Future* program at the University of Houston, and is designed to provide an overview of key strategic issues relevant to the future of California communities and museums. We hope that this report will be of interest to museum professionals as they work to improve their service to the community and plan for the future.

In the Spring/Summer of 2012, a team of museum professionals participating in the California Association of Museum's *Leaders of the Future: Museum Professionals Developing Strategic Foresight* training project conducted their own secondary (*desktop*) research on current conditions, trends, and plans for a *baseline forecast* that postulates our most expected future. The team writing this report included:

- Frank Cassidy, Board Member, Mono County Historical Society
- Ariel Feinberg Berson, Director of Education, Palo Alto Art Center
- Leigh Gleason, Curator of Collections, UCR/California Museum of Photography
- Ariana Karakalos, Curator, Museum of Ventura County
- Karen Graham Wade, Director, Workman and Temple Family Homestead Museum (team leader)
- Elizabeth Welden-Smith, Curator of Education and Public Programs, National Steinbeck Center

The report is structured around the following sections, which define the first half of baseline forecast elements:

- **Domain Definition:** Describes the main elements of this subject matter
- **Current Assessment:** Describes a current snapshot of the domain highlighting key stakeholders, timelines, and issues within society and museums
- **Trends/Projections:** Describes observable trends (changes over time) along with their direction and momentum. In this project, trends and projections are based on more qualitative observations or anecdotal assessments rather than formal (change from A to B; from time X to Y; smart phone adoption has increased from X% to Y% from 2005 to 2012) assessments common to primary research reports
- **Plans:** Outlines stated and potential plans by leading stakeholders and outliers
- **Baseline Forecast:** Combines elements to reveal the most likely future(s) for this domain across different time horizons: 2015, 2020 and 2030

We anticipate the working group and the CAM Foresight Committee will undertake the second half of research highlighting alternative forecast elements during Fall 2012 through Spring 2013. This second phase of research on alternative futures will include:

- **Ideas:** Descriptions of potential *breakthrough or breakdown* visions of the domain by leading evangelists and thought leaders
- **Events:** A spectrum of events (scheduled/planned; plausible; Wildcards) that could alter the future of the domain
- **Emerging Issues:** An outline of emerging issue choices that must be made by individuals, institutions or public policy makers
- **Alternative Futures (Scenario Platforms):** Combined elements that create short alternative scenario platforms for the domain

Note:

Document includes embedded bracketed [hyperlinks] for: *Further Reading, Sources and Citations*

The following foresight research report was developed as part of the *Leaders of the Future: Museum Professionals Developing Strategic Foresight* project. Funding for the project is project is provided by the Institute of Museum and Library Services and the James Irvine Foundation.



the **James Irvine** foundation

The *Expanding Access & Changing Demographics* domain refers to the quantitative and qualitative study of people and societies with particular focus on understanding social change based on life stage and lifestyle transitions.

Strategic Objectives: Expanding Access & Changing Demographics Report

- ✓ Ensuring California museums remain relevant to all communities shaped by demographic transitions by age, ethnicity and universal access
- ✓ Providing context and resource materials for awareness, education, and professional training opportunities on access and changing demographics for museum leadership, staff, volunteers, funders, and partners

Introduction: Expanding Access & Changing Demographics

Those of us who live in California are acutely aware that the state is experiencing unprecedented change in a variety of areas—changes that museums must identify and address if we hope to remain relevant in another 30 years. Our group’s domain topic, “Expanding Access or Changing Demographics,” relates directly to the subject of how we are going to interact with museum audiences of the future. Specifically, we are considering expanding museum access for different demographic groups identified by age, ethnicity, and many other variables such as physical and/or cognitive disabilities or impairments. Different members of our domain group have drafted the three subcategory sections:

- Demographics by Age
- Demographics by Ethnicity
- Access

While the presentation of each subcategory may be slightly different and some research sources overlap, each of the reports considers current conditions, themes/projections, plans, and a baseline forecast for the respective area of concentration. Although two of the subcategories focus specifically on projected demographic changes, the domain group recognizes that the overriding goal for museums of the future will be to provide environments of exploration that will be accessible to all visitors.

Section One: Demographics by Age

Snapshot & Current Assessment: Demographics by Age

The United States is often characterized by large cohort generations—most notably the so-called Baby Boomers, Gen X, and Millennials (Gen Y). Generational cohorts are used by sociologists to describe how individuals who pass through similar life stages and societal conditions (e.g. economic boom, recession, war) and may share certain traits or qualities. They are intentionally used as a broad generalization and not meant to describe any single individual or homogeneity across the generation.

Baby Boomers: Born 1946-64

The Baby Boomer generation includes some 78.2 million Americans, making it the largest and most dominant age demographic. Each day 10,000 baby boomers turn 65. While many in this population group are beginning to think about retirement, trends are showing that many more want to continue working past traditional retirement age. Even if many Boomers wanted to retire, the decrease value of 401K's, minimal savings and non-existent pensions are putting pressure on them to stay employed longer. With this increase in a population who are no longer working, but requiring services and support, more and more government spending is going to fund programs and services for Boomers. At the same time, Boomers are living longer and healthier lives. Senior citizens seek more adventurous and more physically active leisure pursuits. For those who do retire, they are looking for more meaningful and dynamic volunteer experiences, not 'just' stuffing envelopes.

Further Reading:

- [End of the American Dream post]
- [Washingtonpost.com: Businesses help Seniors Age in Place]
- [USA Today: Few US Cities are Ready for Aging Baby Boomer Population]
- [Esquire: Young People Not Prepared for Recession]
- [CDC.Gov Audience Insight Report]

Gen X (Born 1964-1980) & Millennials (Born 1980 - 2000)

Both Gen-X's and Millennials have a heightened sense of individuality and independence, compared to the Boomer generation. Gen-X's and Millennials want to be the protagonists; they want to drive the narrative, rather than being the passive consumers and observers. However, due to rising higher education costs and the economic recession (unemployment and low paying entry-level jobs or non-career jobs), many people in their 20s and 30s are burdened with crippling debt. As such, many also belong to the "boomerang" generation, or those who move back in with parents after moving away from home. It is still unclear how this demographic group engages with their local and civic communities, some claim they are more civically minded while other claim they are the "We" generation, more focused on themselves. Another trend is that people are waiting longer to get married, buy a home, or have children.

Further Readings:

- [Smart Momma: Work & Career]
- [Pew Research: Boomerang Kids]
- [Chronicle of Higher Education: Millennials]
- [Wall Street Journal: New to Museums at All Ages]

Trends & Projections: Demographics By Age

Trends concerning 21st Century Technology, Education and Lifestyle

Faced with these changing age demographics, museums are starting to view themselves as social platforms in addition to their traditional missions. Museum audiences enjoy programs built on crowdsourcing, regardless of their age. Also, increasingly, people are engaging with museums on-line; 43% of all museum visits in 2006 were remote via museum websites.

In addition, with decrease federal and state-wide support, schools are beginning to cut back on museum visits, but relying on museums more heavily to act as a secondary learning environment and to supplement state-dictated curriculum.

Trends concerning Interaction of Baby Boomers and Younger Generations

Millennials and Baby Boomers have very different, often opposing, interests when it comes to museums. Millennials want choice, they want museums to be interactive, participatory, exciting, and a place where they can socialize, lounge, and be the creator, not the passive consumer. Baby Boomers often want museums to be a place of respite and retreat; where they can disengage from the day-to-day and enjoy an unplugged state of being.

For the first time since pre-World War II times, the number of multigenerational households is on the rise due to the financial crisis (young adults boomerang back to their parents because they cannot afford to live by themselves, senior adults cannot afford senior housing and special care and thus rely on their children). People caring for elderly family members and young children may have less time to attend museum exhibits and events or, museum members living in a multi-generational situation will look for and attend more family-oriented cultural programming.

Age will eclipse race and ethnicity as the key factor that splits museum audiences into different interest groups. It will be a challenge for museums to satisfy the needs and interests of both groups.

Regardless of age, museum audiences will be familiar with the use of the internet, smartphones, and eReaders. Museums will offer more information and program updates online. Remote visits to museums will become as frequent as on-site visits, and possibly even more frequent than on-site visitation. Museum audiences will expect more complex and consumer-driven engagements with museum collections.

Boomers

- By 2015, those 50 and older will represent 45% of the US population. In the years following 2015, senior citizens will become the demographic majority.

- As Baby Boomers age, they will be challenged by many of the same physical and cognitive impairments associated with older adults. However, their interests and activities will be different from those currently associated with “senior citizens.” Museum professionals’ challenge will be to adapt programming and volunteer opportunities for this new generation of older adults.
- People 50 and older are expected to spend more money in the “experiential marketplace” (education, sensation, adventure and cultural vacations).
- Museums will engage baby boomers in meaningful ways as volunteers and patrons.

Younger Generations (Millennials/Gen-X’s)

- The crippling debt of today’s 20 and 30-somethings will have a ripple effect into the future. They will not have as much money to spend and donate (to museums) when they get older.
- Museum fundraising will focus more heavily on expanding K-12 access in light of continuing state budget cuts. In addition, museums will explore the possibility of expanding their educational programming to include a) after school programs; b) K - 12 art history, history and science education; and c) pre-school programming. Museum will need larger space, materials, and qualified volunteers.

Plans: Demographics by Age

The following bullet points examine what leading stakeholders and outliers are expected to do in the area of changing demographics by age between now and 2030.

- AARP will increase lobbying to protect social security and Medicare, which in turn will impact the amount of federal funding available for programs focused on younger generations and youth.
- Federal and state funding for museums will be closely tied to their ability to effectively reach and serve the Boomer generation.
- If the financial crisis persists, museums will be cut back in staff and resources, which will lead to cutbacks in operation hours and free or affordable educational programs.
- Education reform will include a shift toward remote learning and consumer-driven, custom-made programing. Teaching will be conducted by educators from a variety of institutions, including schools, museums, libraries, colleges, and the private sector.

Baseline Forecast: Demographics by Age

Below are baseline projections made by domain group members concerning the area of changing demographics by age for the years 2015, 2020, and 2030.

2015

- Crowdsourcing will be a common tool among museum curators. Curators will shift their role from 'academic authority' to 'facilitator of audience participation' and 'quality control manager.'
- Museums will adapt their school and outreach programs to serve increasing numbers of children from economically and socially disadvantaged households.
- Museums will continue to eliminate or scale-back their hard copy publications (exhibit announcements, newsletter, etc.) and reach their membership online.
- Museum will try to offer enough programs in which their audiences can play a role as creators, not just passive consumers.
- Museums will strive to be comfortable spaces where young and old meet and engage in dialogue (baby boomer volunteers as teachers and children/young adults coming to learn and participate in programs).
- There is a chance for museums to become more relevant to children/families through after school programs. Museums can fund these programs through Title I grants.
- Museums will have to find ways to engage younger audiences by allowing them to be part of the narrative and the decision making process. Curators' and educators' role will be to facilitate audience participation and exercise crowd and quality control. Use of social media and technology will help attract younger audiences to museums.

2020

- The *gamification* of museums—on-site and virtually—will be an increasingly significant way to encourage participation and education, especially among younger participants and the non-college-educated.
- As schools lose funding, other cultural institutions, including museums, will have to step in to support learning.
- There will be an influx of Boomer volunteers who will provide museums with a free ‘Brain Trust.’
- As more Boomers begin to retire, there will be more museum jobs available to younger generations. In addition, the transition and retention of institutional memory will become critical.

2030

- Learning will become available 24/7 and year-round across many learning platforms and beyond geographic limits. Learning will happen on-site and remotely. Museums will strive to become one of the new platforms where learning of the 21st century happens.
- As museums become increasingly hands-on, the public’s sense of ownership and engagement will increase.
- In 2030 the oldest of the Baby Boomers will be reaching their mid-80s. Even though an octogenarian of tomorrow most likely will be more active than many we see today in their 80s, museums had better be prepared to accommodate the physical and cognitive impairments that go along with the natural aging process—even if these “new” older adults might never admit to having a disability.
- Cultural institutions that have benefitted from the ‘Brain Trust’ of older volunteers will begin to see a decline as Boomers age. In turn, museums will have to find new staff to fulfill these lost talents.

Section Two: Demographics by Ethnicity

Snapshot & Current Conditions: Demographics by Ethnicity

California's population in the 2010 census was 37,253,956. The California census demographic breakdown was 57.6% white (with 40.1% reporting themselves as "White, not Hispanic"), 37.6% Hispanic/Latino, 13.0% Asian, 6.2% Black, 1.0% Native American, and 0.4% native Hawaiian or Pacific Islander. Compared to national percentages, California has fewer white Americans, and higher percentages of Hispanic/Latino, Asian, Native American, and native Hawaiian/Pacific Islander populations, but a lower percentage of African American residents than the national percentage. In short, California shows more ethnic diversity than the national average.

Nationally, the foreign-born population increases significantly with each census. The 2010 census found that 40 million US residents were foreign-born, up 9 million from the 2000 census, and doubling this segment of the population compared to the 1990 census. California has the most foreign born residents in the nation; 27% of the population were not US citizens at birth. Over half of these immigrants come from Latin America, over 25% from Asia, 12% from Europe, and 4% from Africa and the rest of the world. The survey found that foreign-born households were larger, had more children under the age of 18, and had more of a tendency to be multigenerational than US-born households. Foreign-born Americans also had a higher employment rate.

Partially because it is a border state, California has the highest rate of undocumented immigrants (colloquially called "illegal immigrants") in the country. It is difficult to get a clear population statistic on this segment of the immigrant population, but the Department of Homeland Security estimated that 2.6 million residents in California were undocumented in 2010, and that nationally more than one in four foreign-born residents were here "illegally." These numbers have declined slightly from 2008, which is attributed to the economic climate, and is not seen as a future trend.

A 2007 report by the US Census Bureau found that 42.6% of California's population spoke a language other than English at home; this is more than double the US average of 19.7%. This is the highest rate in the nation. Of the California population, 53.2% rated their English speaking ability as "very well," 19.8% as "well," 17.2% as "not well," and 9.8% as "not at all." These percentages are never more than 3% higher or lower than the national average, indicating that although California has more citizens that speak a language other than English at home, their overall use and mastery of the English language mirrors the national averages. These statistics provide significant insight into California and US demographic breakdowns and must inform decision-making in California museums.

Trends/Projections: Demographics by Ethnicity

With every census the US is showing more diversity and moving away from a white majority and a major increase in foreign-born citizens, a population segment which has doubled every 20 years. Museum professionals need to be aware of the shifting population, and use this information to understand the needs of their audiences. The educational and interpretive needs of recent immigrants may differ from that of US-born citizens; and certainly with the diversity within foreign-born citizens and immigrants, needs vary greatly.

Additionally, the local demographics may demand multilingual museum programming, including bilingual wall labels, websites, advertising, etc. Currently, while some museums are fully multilingual in aspects such as wall labels, many museums—including some of the larger museums in California—only utilize English, or are only multilingual when the show focuses on a specific country or culture. Although statistics indicate that many people who do not speak English at home have strong or somewhat strong mastery of English, some of this population may feel more comfortable with labels written in their native tongue, or feel like they are meant to be part of the museum's audience.

In addition to multilingual, programming will also need to become more multicultural, reflecting a multitude of cultures and stories. This trend will see a focus on not just singular cultures, but also on cross-cultural heritage.

Below are a series of trends in the demographics of the US, and California in particular, as they relate to ethnicity. A focus on immigration trends, policy and reform are also included.

- The Latino population in the US continues to grow and will reach 111 million by 2050, nearly 28% of the total population; the current Latino population in California is 14 million, one of the highest in the nation. [Source]
- Minority births outnumber white births in the US. [Source]
- According to a Pew Hispanic Research Report, Hispanics account for more than half the nation's growth in the past decade.[Source]
- California has the most foreign born residents. (Source)
- While the minority population in the US continues to grow (more than 6 out of every 10 Hispanics in America were born in the U.S.), immigration from Mexico comes to a standstill. [Source]
- Pew Hispanic Center, a division of the Pew Research Center, recently published a report about Hispanic views of identity. Among others, findings indicated that most identify with their country of origin rather than the generalized grouping of "Hispanic" or "Latino." [Source]
- According to the Public Policy Institute of California report on illegal immigration, the overall sentiment in California is that undocumented workers are good for the economy. While immigration is a national issue, several states have adopted requirements for verifying employment status, called e-Verify. Immigration will continue to be a national debate for years to come. [Source]
- California continues to be unique in supporting its immigrant population, compared to national trends. Organizations like the California Immigrant Policy Center continue to support the rights of immigrants in California. [Source]
- Immigration Day in California: California Immigrant Policy Center. [Source]
- New American Media: Immigration Day Legislation. [Source]

- Support for immigrant workers after being fired from a California university. [Source]
- Museums, arts organizations and universities are partnering on an initiative to use art discussions as a way to develop English language skills, develop critical thinking skills, and to empower Adult Language learners: Recent newsletter on using Visual Thinking Strategies (VTS) with Adult English Language learners through an organization called CALTA21. [Source]
- Museums are developing bilingual programming and have bilingual greeters/interpreters to help make museums more accessible: Denver museums use special events to attract Latino audiences. [Source]

Plans: Demographics by Ethnicity

The following bullet points examine what leading stakeholders and outliers are expected to do in the field of changing demographics by ethnicity between now and 2030.

- While the general sentiment in California is in support of immigrants, this is contrary to the national view. The US government is likely to crack down on immigration laws.
- Museums will continue to be cultural institutions creating a space to encourage exploration and celebration of cultural identity despite immigration policy.
- Museums focused on specific ethnic experiences are prevalent in California, and are a key site for individual cultural communities to feel engaged and connected to the museum experience. Their success has been a model for focused public programming in larger museums with more diverse missions.

Baseline Forecast: Demographics by Ethnicity

Below are baseline forecasts made by domain group members concerning the area of changing demographics by ethnicity for the years 2015, 2020, and 2030.

2015

- As California becomes more culturally and ethnically diverse, but at the same time sees an increase in older adults, the museum field will need to recognize how different cultures approach aging and the different characteristics that we will see in various older populations. Likewise, the same could be said for how different cultures approach topics related to individuals with disabilities, as well as how the family unit begins to change.
- As the Hispanic population in America continues to grow, museums will need to find ways to attract this audience to stay relevant.
- Pew research indicates that Hispanic population identifies more with their country of origin rather than as Hispanic or Latino; museums will need to consider offering programs to match the specific interests and cultural practices of specific countries in order to attract visitors.
- African American and Hispanic participants are more likely than others to list a desire to “celebrate heritage” as a reason to attend arts and cultural events. Museums will need to allow for programming that focuses on cultural celebrations if they want to attract African American and Hispanic audiences.

- Although most Latino museum visitors will be English speaking, they still will appreciate bilingual signs as signals that museums are inclusive and welcoming to immigrant families and non-English speakers.
- Hispanics with lower income and lower educational levels will tend to seek cultural activities that engage extended families and promote family unity. Museums must offer such cultural activities if they want to be relevant for this demographic group.
- African American, Asian American and Hispanic audiences will feel more welcome if all museum staff reflect ethnic diversity.
- Age and socio-economic disparity will eventually eclipse race and ethnicity as the key factor that splits museum audiences into different interest groups.
- With growing child poverty rates, and about 50% of all children in California being immigrants, California museums will begin to adapt their school and outreach programs to serve children from all socioeconomic backgrounds.
- Because it will remain a hot-button issue on the national platform, a museum may incite controversy or protest by staging exhibitions about illegal immigration, especially if the exhibition or institution receives public funding

2020

- Since 50% of all California children will be immigrants, half of them being Hispanic, museum's educational programs will change to stay relevant for their young audiences.
- Bilingual educational programming will become the 'norm' for museums across California.
- Educational funding remains strained; schools in poorer areas (which may include high minority populations) will not have the funding or ability to travel far from their neighborhood to engage with museums.
- Museums will find more ways to continue to utilize slick, well designed websites, but with more accessibility for multilingual audiences, and more features highlighting collections items (or relevant narratives, etc.) that speak to diverse cultural interests.

2030

- The public's sense of ownership and engagement in museums will increase due to museums' more personalized and hands-on virtual and physical presence.
- With new generations of museum studies graduates, museum staff and board members will more accurately reflect the communities they serve.
- With the growth of multicultural families, museums will focus on similarities of cultures rather than cultural difference. Other demographic differences will rise to the forefront.

Section Three: Demographics & Access

There are many issues to consider when attempting to improve visitor access to a museum. While our domain group has focused primarily on visitor needs and preferences based on generational and ethnic demographics, museums in the future also will be challenged to make their institutions accessible to an increasing number of visitors having physical and cognitive impairments. In attempting to meet the special needs or interests of visitors, however, it will be equally important that museums do not unduly segregate any one group from their broader audience. This need for integration applies equally to visitors speaking different languages than English or coming from different cultures, visitors of different ages, or visitors having different physical or cognitive abilities or disabilities. Since learning styles tend to differ by generation, museums also will need to provide their audiences with a variety of experiences. In striving to address the needs and interests of such a diverse group of people, it will be important to remember the basic concepts of Universal Design.

Current Conditions: Demographics & Access

Below are several articles or reports that address the broad area of accessibility as we see it today. Many of these scan hits concern the need to provide greater access for people from different cultures and those who are non-English speakers and for older adults or people with varying degrees of disabilities. Other scans concern creating opportunities for attracting visitors from different generations; new technologies and crowdsourcing that can be used as tools to increase accessibility; and the opportunities museums have to play a major role in formal as well as informal education, making the museum learning experience more accessible for students of all ages.

- All Access Pass: Making a Small Museum Disabled-Friendly [Source]
- More people are living alone [Source]
- By learning how to create a better environment for folks with hearing impairments, we can improve the environment for everyone [Source]
- Government funding is drying up for programs serving older adults [Source]
- Personal observations regarding the increasing demand for programming for people with memory loss [Source]
- Music programs for elders with dementia, part of an NPR series [Source]
- A new art museum program for visitors with Alzheimer's and their caregivers that also involves middle school students [Source]
- When Labels Don't Fit: Hispanics and Their Views of Identity, from Pew [Source]
- SF Museums seek young professional audience [Source]
- Community Involvement: Discovery Center Museum, Rockford, IL [Source]
- The deCordova Sculpture Park and Museum in Lincoln, MA. announced what it calls the first pre-school in an American art museum [Source]
- The future museum and the future school [newlearningonline.com] – Researchers across Europe conduct experiments to bring the museum into the school using virtual reality technology. In its software, CONNECT has produced a stunning virtual museum, featuring colorful, exciting graphics that allow a student to try experiments and then view the results. This advanced learning environment is called the CONNECT Virtual Science Thematic Park.

- Changing Demographics of Tablet and eReader Owners in the US, users aged 45 and older are on the rise [Source]
- Plains Art Museum Seeks Community Involvement in Upcoming Exhibition [Source]
- The Portland Art Museum Transforms an Exhibition into a Social Platform [Source]
- LeadingAge: Leisure Time Pursuits [Source]
- 43% of all museum visits in 2006 were remote, predominantly via museum websites, according to the research by Institute for Museum and Library Services; Museum & Society 2034 [Source]
- Schoolyard Design for Children with Autism [Source]

Trends/Projections: Demographics & Access

The following bullet points express what members of our domain group feel will be trends influencing the broad area of museum access, as well as their projections as to how issues of accessibility may change in the future. Some trends may be repeated from the sections above because they influence both areas. Once again, these trends and projections address various issues of museum access ranging from demographics related to age and ethnicity, to the use of new technologies, crowdsourcing, and issues of visitor health and well being.

- School day in 2025 forecast: Learning is available 24/7 and year round across many learning platforms and geographic limits
- As funding is cut for non-profit and government programs serving people with various disabilities (both physical and cognitive), increasing opportunities will arise for the museum field to address the needs and interests of these diverse audiences.
- As Baby Boomers age, they will be challenged by many of the same physical and cognitive impairments associated with older adults. However, their interests and activities may be very different from those currently associated with “senior citizens.” Museum professionals must be ready to adapt programming for this new generation of old adults.
- As California becomes more culturally and ethnically diverse, but at the same time sees an increase in older adults, the museum field needs to recognize how different cultures approach aging and the different characteristics that we will see in various older populations. Likewise, the same could be said for how different cultures approach topics related to individuals with disabilities.
- As the Hispanic population in America continues to grow, museums need to find ways to attract this audience to stay relevant.
- Pew research indicates that the increasing Hispanic population will continue to identify more with their country of origin rather than as Hispanic or Latino; meaning museums should consider offering programs to match the specific interests and cultural practices of specific countries in order to attract visitors.
- Music and the visual arts will become increasingly popular offerings for people with dementia, providing windows into memory as well as offering enjoyment.
- Young professionals (often the Millennials) will continue to be a target audience for museums; use of social media, technology will continue to influence how this demographic group engages with museums.
- The number of smartphone, tablet and e-Reader owners over the age of 45 will continue to steadily rise.

- Museum audiences will increasingly enjoy programs that are built on crowdsourcing and social platforms.
- Schools will no longer be the sole providers of education, a whole host of learning agents supporting learning, including museums
- Americans aged 55 and up should remain the fastest growing segment of online social media users.
- Half of the people approaching retirement age expect to keep working and those who have the time to volunteer expect their volunteer contributions to be more than stuffing envelopes. They will want to do meaningful work with a higher responsibility level.
- African American and Hispanic participants will be more likely than others to list a desire to “celebrate heritage” as a reason to attend arts and cultural events. Museums must allow for programming that focuses on cultural celebrations if they want to attract African American and Hispanic audiences.
- Although it is expected most Latino museum visitors will continue to be English speaking, they will still appreciate bilingual signs as signals that museums are inclusive and welcoming to immigrant families and non-English speakers.
- Hispanics with lower income and lower educational levels will tend to seek cultural activities that engage extended families and promote family unity. Museums must offer such cultural activities if they want to be relevant for this demographic group.
- African American, Asian American and Hispanic audiences will feel more welcome at museums if the front-line staff and board members reflect ethnic diversity.
- Age will eventually eclipse race and ethnicity as the key factor that splits museum audiences into different interest groups. The Millennial generation (18-29 year olds) will have different interests and needs than Baby Boomers. Millennials want choice, they want museums to be interactive, participatory, exciting, and a place where they can socialize, lounge or create. Baby Boomers often want museums to be a place of respite and retreat; where they can disengage from the day-to-day and enjoy an unplugged state of being. It will be challenge for museums to satisfy the needs and interests of both groups.
- College-educated women will have children later in life. Mothers visiting museums with their children will more likely be in their 30s and 40s, rather than their 20s. These mothers will have higher expectations regarding museum’s educational programs.
- Remote visits to museums will continue to rise, and museum audiences’ expectations will shift from basic information gathering to more complicated forms of engagement with museum collections.
- Although people will spend more time in the virtual world (for work and recreation), they will still—or exactly because of it—have a need for spending time in the real world. Museum’s advantage is that they will play the role of the purveyor of the authentic, providing a space where people can engage with real things and have real eye-to-eye social time with their friends and family.
- Americans currently under 30 will want to be the protagonists; they will continue to want to drive the narrative, rather than being the passive consumers and observers. Museums will have to find ways to engage younger audiences by allowing them to be part of the narrative and the decision making process. Curators and educators’ role will be to facilitate audience participation and exercise crowd and quality control.

- Declining walking trends will likely affect Americans' health and future mobility—and probably also current/future willingness to seek out activities that involve additional walking and standing (such as museums) in their day-to-day lives. [Source]
- Funding shortages and staffing cuts will continue to affect access to groups (tours, school groups, total number of public hours), especially at smaller museums.
- The trend seen in an AAM survey which indicates a decline in school groups accessing museums will likely continue due to decreased school funding and/or changing focus of education (No Child Left Behind testing requirements/focus, etc.).

Plans: Demographics & Access

Between now and 2030 we can anticipate, or at least speculate, what the leading stakeholders concerned with our domain topic will do. So, who are the stakeholders? Federal and state governments most likely will have the most power and influence over conditions of access for ethnic minorities, especially related to matters of immigration; and the Federal government through provisions of the ADA will continue to influence policies concerning access for individuals with identifiable disabilities. Regarding programs designed to assist older adults (e.g., Medicare, Social Security), Federal programs will most likely continue to exist, but not to the degree needed to meet the needs of this large demographic group. So, what will government do to address these issues? A lot will depend on the voting public who will elect the officials who create and maintain policy. While the historic pendulum of public sentiment currently is swinging slightly to the right due to the Great Recession, by the year 2030 sentiments regarding broader access to social services and general amenities of life may have shifted significantly.

Another group of stakeholders, the advocates for access, will become increasingly vocal concerning their rights. These advocates will represent all of the groups covered by our domain topic, be they ethnic groups, older adults, or individuals with disabilities. Also, younger adults will advocate for their own interests, and concerned individuals of all ages will advocate for children. However, the big question will be whether society can afford the degree of access demanded by these advocacy groups. The answer most likely will be, no it cannot. This means that a third stakeholder group, non-profit institutions, will be forced to rethink how they operate or face extinction. Those that adapt will survive; those that don't will disappear. The question is: How will non-profits in general, and museums in particular, adapt so as to survive and provide maximum access for all visitors.

Baseline Forecast: Demographics & Access

Below are baseline forecasts made by members of our domain groups concerning issues of museum visitor access for the years 2015, 2020, and 2030.

2015

- In another three years a number Baby Boomers will have retired, so those of us in the museum field should make certain we not only find ways to engage them as visitors, but utilize their skills and experiences as volunteers, part-time paid staff, or consultants.

- With growing child poverty rates, and about 50% of all children in California being immigrants, California museums need to adapt their school and outreach programs to serve children from economically and socially disadvantaged households.
- Museum audiences increasingly use smartphones, tablets, and eReaders. Museums can therefore offer more information and program updates on-line.
- Exhibit programs will need to explore the possibility of crowdsourcing and social platforms as a way of making them more accessible.
- Museums will need to explore the possibility of offering after school programs.
- Museums must attract boomer generation to become the next generation of volunteers. Both men and women bring more and more advanced professional skills to the table than ever before.
- Boomers will make up the majority of museum audiences. Curators and educators need to keep them in mind when creating exhibits and programs.
- As State funding for education continues to diminish, museums must take on a greater role in helping to educate primarily in the art and history fields. This is especially true in the K-12 category. Larger space, materials, and qualified volunteers are needed.
- Museum fundraising will have to focus heavily on expanding K-12 access in light of continuing state budget/state educational funding woes.
- Immersive virtual access—with consideration for impaired (e.g. limited vision) and multilingual audiences—will continue to expand.

2020

- By 2020 the dramatic increase in adults experiencing memory loss, ranging from mild to severe, will become glaringly apparent. If museums have not already provided program access for this audience they will have to—so we'd better be ahead of the curve and start thinking now about how to engage these visitors.
- Since 50% of all California children will be immigrants and half of them being Hispanic, museum's educational programs will need to stay relevant for their young audiences.
- Because members will be accustomed to using the internet, smartphones, tablets, and e-Readers, museums can eliminate or scale-back their hard copy publications (exhibit announcements, newsletter, etc.) and reach their membership through online venues.
- Museum will offer enough programs in which their audiences play a role as creators, not just passive consumers.
- Museum will offer art and history education to school children since learning now happens across many learning platforms, not just schools. Aging baby boomers will be well qualified volunteers who can support those programs.
- The gamification of museums—on site and virtually—will be an increasingly significant way to encourage participation and education, especially among younger participants and the non-college-educated.
- It will be virtually impossible for museums to receive major/federal grants without demonstrating their strong connection with, and innovative programming for, the expanded demographics we are describing.

2030

- In 2030 the oldest of the Baby Boomers will be reaching their mid-80s. Even though an octogenarian of tomorrow most likely will be more active than many we see today in their 80s, museums should be prepared to accommodate the physical and cognitive impairments that go along with the natural aging process—even if these “new” older adults might never admit to having a disability.
- It is hoped museums will have become more relevant to children/families through after school programs, funded through Title I grants, assuming they still exist
- Museums will communicate with their membership and audiences via e-newsletters, email updates, and social websites. Hard copy publications are only used for special event invites, catalogues and research journals.
- Crowdsourcing will be used as an effective tool used by museum curators and educators.
- Students will learn about art and history at their local museums. Museums will be well established platforms where learning of the 21st century happens.
- Museums will be comfortable spaces where young and old meet and engage in dialogue (baby boomer volunteers as teachers and children/young adults coming to learn and participate in programs).
- Museums, supported by grants (possibly from The Institute of Museum and Library Services, assuming it still exists) will take on a much greater role in education.
- The public’s sense of ownership and engagement in museums will increase due to museums’ more personalized and hands-on virtual and physical presence.

Additional Resources & Research Tools

State of California

- US Census: State of California *Quick Facts* [Source]
- Department of Finance Demographics Research Unit [Source]
- Orange County - Center for Demographic Research (CDR) [Source]
- Public Policy Institute of California [Source]

US Census

- US Census – 2010 [Source]
- US Census American Factfinder™ [Source]
- US Census Scope Tool [Source]

Global Demographics

- United Nations Statistics Division [Source]
- California Center for Population Research [Source]
- Stanford University Center for Population Research [Source]

Universal Design

- List of resources concerning universal design within cultural institutions [Source]
- YouTube video produced by the Met [Source]
- In science museums [Source]
- Universal Design for Learning [Source]