GileadSanders
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FUTURE TRENDS IN ARTS & ENTERTAINMENT



PERSONALIZED EXPERIENCES WILL DEFINE THE FUTURE

Welcome to the future

When you think about the future what do you envision? Perhaps a world that is automated by robots? Manned by autonomous vehicles and maybe even extremely intelligent and powerful computers running every aspect of our societies. Truth be told, all of these scenarios are not only plausible but very close to becoming reality. The rate of speed at which technology is growing and being integrated in the very fabric of our societies promises to transform the very essence of what we have understood to be our human existence on our planet.

Every aspect of our lives will be shaped by this new paradigm. This emerging evolution requires that leaders look to the future with an entirely different lens than before. As the very nature of work, culture and business shifts, companies must grapple with this new reality with a deeper understanding of the forces that will reshape their industry and the competitive landscape. The customer environment will not only be more complex but also grow exponentially as it shifts from local to global.

> **The digital age is ushering fundamental changes to how work gets done, how industries are structured, and how people collaborate.**

The Arts & Entertainment industry will undergo some profound changes in the years to come like so many other industries. From the introduction of Virtual Reality and Augmented Reality that will enhance viewers' experience in a profound way, to completely immersive experiences that engage participants in new and interactive sensations. The Arts & Entertainment industry will become an on-demand platform like its other counterparts in music and media, transportation and even health care: highly customized and available at a moment's notice.

At Gilead Sanders, we understand the pressures and demands that businesses and organizations face with these enormous waves of changes ahead. Gaining a better understanding of the forces that will create both unprecedented opportunities and threats is at the top of the list of every CEO and entrepreneur today. We help executives understand, develop and create robust strategic roadmaps to their preferred future by leveraging the exponential growth and game-changing technologies that will bring profound changes in the years to come.

We explore some of these ideas in this primer to help you gain perspective in your strategic thinking of the future. Our team is prepared to meet with you to discuss them in depth and share how we partner with organizations like the Adrienne Arsht Center to help pave the way forward. We look forward to meeting with you soon and being your guide on this exciting journey!

Marvin Dejean
Sr. Managing Partner
Gilead Sanders LLC





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BUSINESS TRENDS

MULTI-USE SPACES

Although traditionally not thought of as a technology, physical spaces are becoming more hybrid, giving artists free rein on the built environment and resulting in adaptable experiences for viewers.

How it works

Nearing completion, the Perelman Performing Arts Center in Manhattan will boast 11 performance venue arrangements within a 138-foottall structure at the World Trade Center complex. The reconfigurable space will host a wide variety of live performances and events and accommodate digital technologies that enable high-definition broadcasts of shows for remote viewing.

The stage can adapt its space to accommodate a crowd of 99 or 1,200. A predecessor in this domain is The Shed, also in New York. Its interconnected spaces enable variable, simultaneous programs. With its convertible outer shell, the space can adapt in little time, providing variable light, sound, and temperature conditions. Ultimately, the space is designed for flexibility, being able to adapt to the demands of live performances in the future.

Why it matters

According to architect Chafik Gasmi, when physical spaces become dynamic or hybrid, then stores, restaurants, bars, museums, theaters, and hotels must no longer be separate entities; they can become fully integrated experiences.

Interactive spaces will no longer be inert but must change with frequency to keep viewers and customers engaged. **The role of employees in such spaces will change as a result, requiring cross-functional skills and training that enable the workforce to be flexible, while catering to a broad range of consumer engagements.** As physical spaces become more adaptive, they will usher in new forms of entertainment and new ways for it to be consumed. When space can be adapted in real time, property managers can increase its monetization by repurposing the square footage to offer different products at different times of day.



IMMERSIVE EXPERIENCES



Installation artists have long developed fully immersive multisensory experiences, pulling viewers into alternate realities and new worlds. Now they have a slate of new technologies at their disposal to heighten these experiences, blurring the lines between physical and digital realms.

How it works

Alienarium 5, an exhibition by Dominique Gonzalez-Foerster, uses technologies such as AR and VR to produce images of holographic aliens and simulations of extraterrestrial life. The experience is further enhanced with sound and smell. Ohio-based Otherworld offers 32,000 square feet and 47 interactive rooms including bioluminescent landscapes and imaginative playgrounds. In New York, “Wonderland Dreams” is an immersive 3D painting created by artists Alexa Meade and Catching Flights. Emulating “Alice’s Adventures in Wonderland” and called the “largest continuous painting in the world,” the piece allows visitors to step into the physical space that the fictional painted landscape occupies.

Walt Disney has partnered with Lighthouse Immersive, the company behind exhibits like **“Immersive Van Gogh”** and “Immersive King Tut,” to launch a live experience celebrating several iconic animated franchises. **Lasting 60 to 90 minutes, the exhibit allows guests to interact with different displays and be immersed in projections and screens that depict how an animated film is created.**

Why it matters

Unlike traditional museums, immersive installations do not rely on displaying rare objects that can be present at one location at a time. These works of art can be reproduced on an industrial scale. If the material is licensed, it can theoretically be displayed anywhere in the world at the same time, creating a cultural momentum not previously possible. Immersive art functions less like a museum or gallery and more like a tech platform, enabling a large-scale collective experience.

While many immersive art experiences have been temporary, **a venue in London called Frameless is the first permanent space of this kind that pulled in $227 million for Fever Labs,** the company that created “Van Gogh: The Immersive Experience.” This marks the largest-ever round of funding for a live-entertainment startup.

HOLOGRAPHIC LIVE PERFORMANCES

Live acts are freeing themselves from location-specific constraints. Volumetric capture and ubiquitous highspeed connectivity promise to replicate performances in real time to any venue.

How it works

"Abba Voyage," created by George Lucas' Industrial Light & Magic, used a form of the famous Pepper's ghost effect to bring younger versions of the Swedish band's performers back to the stage. **A hologram of Freddie Mercury sang on Queen's "Rhapsody"** tour, and "An Evening with Whitney: The Whitney Houston Hologram Tour" kicked off a residency in Las Vegas. To be fair, celebrity holograms have been around since the appearance of a posthumous Tupac at 2012's Coachella festival.

What is new is the development of real-time hologram creation: **Researchers at MIT have discovered a method, using the computing power of consumer equipment, to create photorealistic 3D holography with deep neural networks nearly instantaneously.** A global device partnership between Deutsche Telekom, Orange, Telefónica, Vodafone, and Slovakian deep tech company Matsuko is exploring solutions to enable 3D holographic phone calls. Paired together, these developments could soon enable global real-time holographic versions of a live performance.

Why it matters

Amplified by the rising costs of touring and the health insecurity of the pandemic, big ticket acts have reduced their world tours to a small selection of cities per country, forcing their fans to come to them: Harry Styles' North American tour included 42 shows in just five cities.

Residencies in Las Vegas continue to be popular: Adele, Usher, and Katy Perry are among the acts opting for more permanent performance homes there. **Offering fans an actual live experience closer to home provides the opportunity to multiply the earnings potential for every concert given, even if the projected concert tickets are sold at a lower price point.**



FUSION THEATER

Theater companies are experimenting with varying degrees of audience participation, alternate realities, and both persistent and ephemeral world building. The result is not merely a hybrid theater experience but an emerging new artform.

How it works

Danish theater company Fix & Foxy created “Homeparty,” an in-home audio experience for groups of six to 10 people who receive roleplay direction through earphones. “Is Anybody Home?” is a collaboration between Berlin-based theater company Gob Squad and the Volksbühne, an interactive experience where a guest can play a role in a film being projected at the same time. Academy Award-winning director Danny Boyle will direct an immersive dance performance titled “Free Your Mind” that is based on “The Matrix” and will be out this fall. Boyle’s project promises to “stretch across the building’s spaces and respond to them, harnessing the collective energy of the moment.” **Los Angeles-based Tender Claw has created two immersive digital theater adventures—“ The Under Presents” and “Tempest”—that take place in VR during set performance times. Audience members wander through the digital world among virtual beings—some of them actors, some artificial characters—and can influence the evolution of the narrative.**

Why it matters

New theater experiences aim to draw new audiences—younger people as well as those who are challenged to get to an actual theater, be it for physical or other restrictions, such as time or distance. Digital technologies open up new forms of storytelling. Educational institutions, along with theaters and private companies, are providing extensive resources to a new generation of theater creatives, allowing them to explore fresh avenues of creativity and ensure that hybrid experiences are here to stay. However, creating narratives in virtual and augmented reality is quite costly and requires large audiences to pay for itself—or else the industry will have to wait for the technology to mature. Odeon Theatrical, which helps theater companies easily introduce AR into their productions, is one effort to scale the new forms.

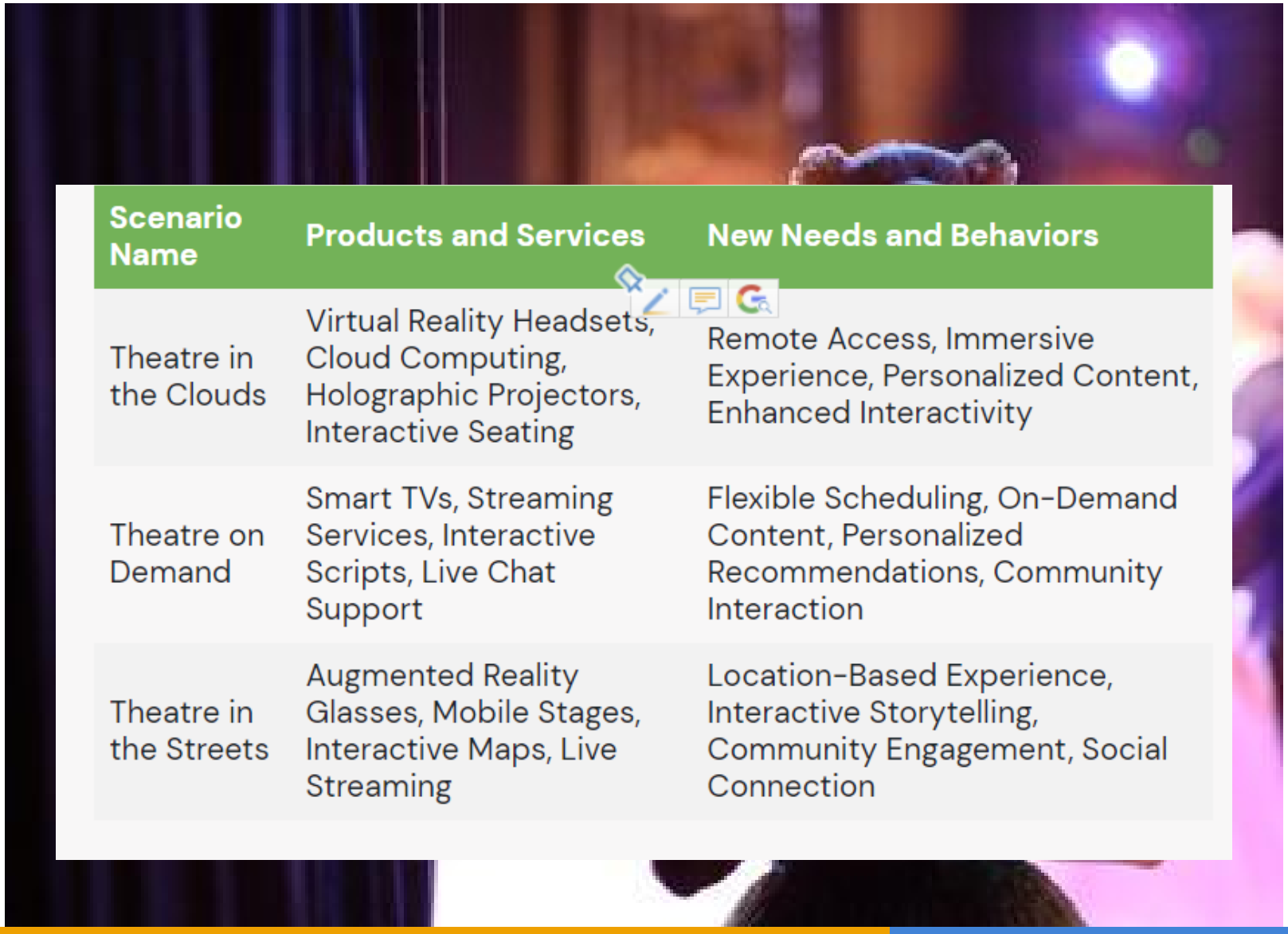


THE FUTURE OF THEATER

What is the future of the performing arts in five years? ten years? No one can predict the future, but one thing remains certain, some of the preceding trends and others will surely make their way into the genre. As the next generation of patrons develop a taste and experience for mixed media, virtual reality and on demand services, they will expect these features in almost every product or service they seek.

At Gilead Sanders, we are not in the business of making predictions. Rather we keep an eye on the prevailing signals that herald new ways of interacting and behaving that are sure to bring about new expectations from consumers. We help you connect the dots and create new avenues to experiment and prototype new projects, ideas, and business models for the future. We help build scenarios that can expand your thinking into that future and help you build and create realistic, market-tested and validated projects that can lead you to adapt to a changing reality.

The following are some plausible scenarios we created based on emerging signals that may find their way into the realm of the performing arts in the very near future.



Scenario Name	Products and Services	New Needs and Behaviors
Theatre in the Clouds	Virtual Reality Headsets, Cloud Computing, Holographic Projectors, Interactive Seating	Remote Access, Immersive Experience, Personalized Content, Enhanced Interactivity
Theatre on Demand	Smart TVs, Streaming Services, Interactive Scripts, Live Chat Support	Flexible Scheduling, On-Demand Content, Personalized Recommendations, Community Interaction
Theatre in the Streets	Augmented Reality Glasses, Mobile Stages, Interactive Maps, Live Streaming	Location-Based Experience, Interactive Storytelling, Community Engagement, Social Connection

Theatre in the Clouds



You put on your virtual reality headset and log into the cloud platform for Theatre in the Clouds. You're excited to see the latest production, which is touted as an immersive experience like no other. As you enter the virtual theatre, you see that it's not just a 360-degree video projection. You can interact with the environment, move around, and touch objects. You take your seat in an interactive chair that lets you feel the vibrations of the music and sound effects. The show begins, and you're transported to another world. The characters are not just on stage, they're all around you. You can follow them, interact with them, and even change the course of the story. The cloud platform allows for real-time rendering and streaming of the content, so you never experience lag or buffering. As the show ends, you take off your headset, feeling like you've just experienced something truly magical.

Theatre on Demand



You're browsing your favorite streaming service for something to watch when you see a new category: Theatre on Demand. Curious, you click on it and see a variety of plays and musicals available to watch whenever you want. You scroll through the options and find a show that catches your eye. As you watch, you realize that this isn't just a recorded performance. The script is interactive, allowing you to make choices that affect the storyline. You can also chat with other viewers in real-time, sharing your thoughts and reactions. If you get stuck or have a question, you can access live chat support to help guide you. After the show, you rate the performance and leave a comment, contributing to the community around Theatre on Demand. You love the flexibility and convenience of being able to experience theatre whenever and wherever you want.

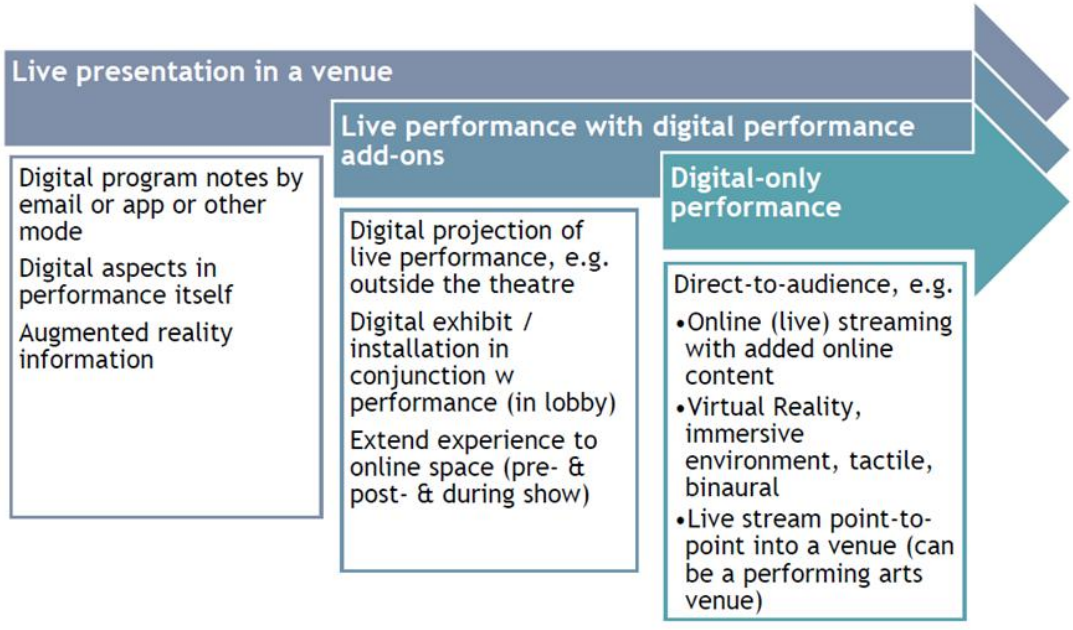
Theatre in the Streets

You're walking down the street when you receive a notification on your augmented reality glasses. It's an invitation to a pop-up theatre performance that's happening nearby. You accept and the glasses display a map with directions to the location. As you arrive, you see a small stage set up in the middle of the street. You put on your glasses and the performance begins. The actors interact with the environment, using the buildings and sidewalks as props. The glasses overlay additional information, like historical context or character backstories. You even get the chance to participate in the performance, using your own phone as a prop. As the show ends, you see that it's being live-streamed to audiences around the world. You feel a sense of community and connection as you watch the comments and reactions come in from people in different cities and countries. You realize that theatre doesn't have to be confined to a traditional stage, but can be an interactive and immersive experience that brings people together.



Digital in Performance: A Continuum

At present, we can delineate three main points on the digital performing arts continuum[15].



HOW TO PREPARE

What should your organization do now to prepare for these trends?

SCALING PERSONALIZED CONTENT

If entertainment companies can access more data about their consumers—not just the data from within their own ecosystems but also data from, say, Google or Facebook— they can begin to create personalized experiences at scale. These would be limited primarily by the capabilities of the tools creating the experiences—for instance, the ability for AR and VR systems to provide real-time responsiveness, or of AI to reassemble and customize content according to a viewer's profile. Beyond that, the biggest limitation will be the entertainment industry's own ability to produce enough modular content to customize.

KEY QUESTIONS FOR YOUR TEAM

- How can you begin to pave the way for blockchain integration into your operations to make processes more efficient, safe, and transparent?
- How can you begin to pave the way for Augmented Reality and Virtual Reality into your operations to make processes more customizable, long lasting, and interactive??
- There is a tension between the desire for personalized experiences and the power of communal experiences. Have you determined what your customer prefers? And how can you optimally combine these approaches in your product?
- What will the average attention span be in five years, and how can you adjust your product to optimize it for consumption?
- How can the implementation of hybrid, modifiable physical spaces best enhance user experiences?

NEXT STEPS

Our focus at Gilead Sanders is to help our clients think deeply about the future and develop strategic and tactical roadmaps for transformation. As your business environment continues to evolve, we help you understand the forces that are reshaping your business model and what your customers value as their tastes and expectations shifts and evolves. We look forward to meeting with you to discuss these and other trends that may be keeping you up at night. We will help guide you to what comes next.

Please reach out to us at mdejean@gileadsanders.com to schedule your first **Executive Dialogue**. Welcome to the future.

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