



Expert Workshop Synthesis

Prepared for the California Arts Council
by Institute for the Future

November 2025



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Introduction

IFTF convened a series of expert workshops on May 29, July 8, and July 11, 2024. These workshops were facilitated brainstorming sessions that included experts from a variety of fields relevant to the future of California's creative economy.

Participants:

- **Kiley Arroyo**, Executive Director, Cultural Strategies Council
- **Sabrina Klein Clement**, Consultant, Creative Education Consulting
- **Andrew deWaard**, Assistant Professor of Media and Popular Culture, UC San Diego
- **Marientina Gotsis**, Director of Creative Media and Behavioral Health Center at USC
- **Josephine Ramirez**, Executive Vice President at The Music Center
- **Rebecca Renard-Wilson**, Senior Manager of Youth Development, Los Angeles County Department of Arts and Culture
- **Vinitha Watson**, Executive Director, Zoo Labs
- **Mike Zuckerman**, Anticipatory Applied Geographer
- **Barry Threw**, Executive Director, Gray Area
- **Gioia Fonda**, Professor of Art, Sacramento City College
- **Colin Mutchler**, Civic Creator and Entrepreneur
- **Jeremy Liu**, Managing Partner, Creative Development Partners
- **Calder Johnson**, Managing Artistic Director for the North Coast Repertory Theatre

Introduction (cont.)

The goals of these sessions were to identify shifts in the creative ecosystem and their driving forces, discuss the long-term implications of these changes, and generate ideas for necessary actions and interventions (including policies, practices, and decisions) needed both now and over the next decade to transform California's creative economy. This report compiles ideas presented during these workshops, organized according to the workshop agenda.

Participants (cont.):

- **Laura Callanan**, founding partner of Upstart Co-Lab
- **Tom Ascheim**, Co-Founder and Principal, Pith & Pixie Dust
- **Marc Bamuthi Joseph**, Vice President and Artistic Director of Social Impact at the Kennedy Center
- **Jonathan Youtt**, Founder of Cellspace
- **Jesse Bliss**, Executive Director, Roots and Wings Project
- **Jan English-Lueck**, Professor of Anthropology, San Jose State University
- **Elizabeth Merritt**, VP Strategic Foresight, Center for the Future of Museums, American Association of Museums
- **Johan Chu**, Assistant Professor, MIT Sloan School of Management
- **Amy C Whitaker**, Associate Professor of Visual Arts Administration, NY University
- **Madeline Ashby**, Futurist, Changeist
- **Roshaun Davis**, Co-Founder, Unseen Heroes
- **Rebecca Campbell**, Board Member, Meow Wolf

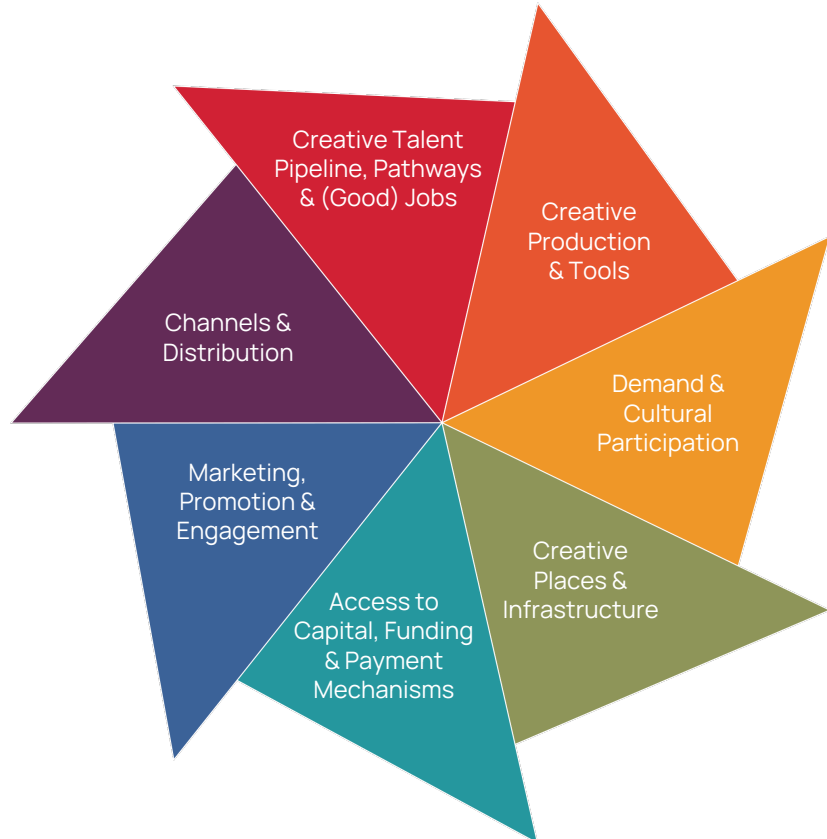


Mapping the Creative Economy

Creative Economy Framework

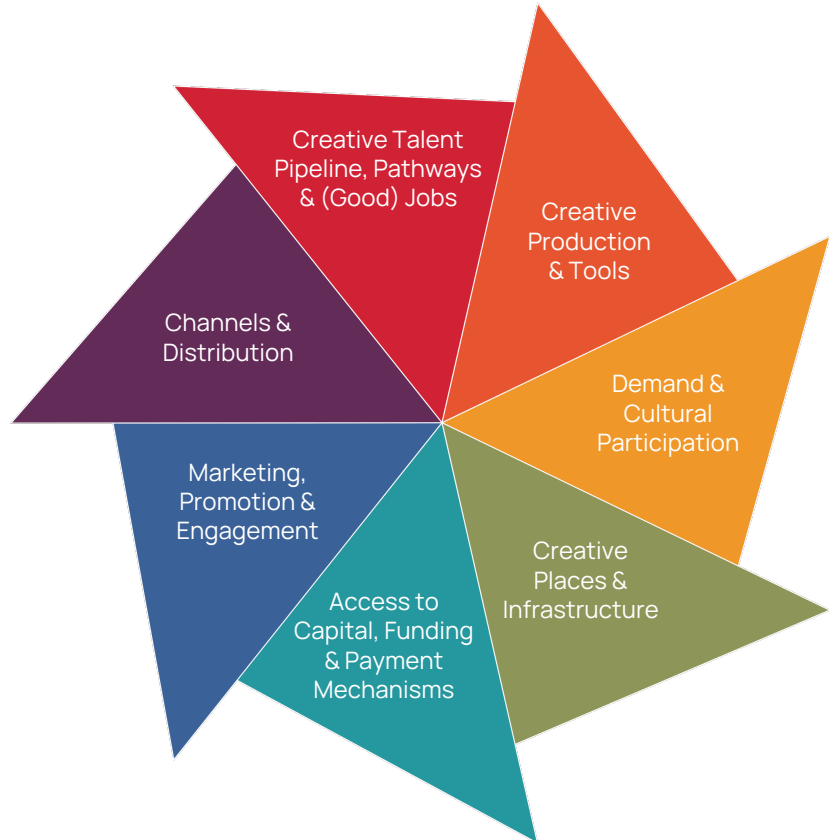
At the workshops, we shared a draft framework for forecasting the future of the creative economy consisting of seven categories:

- Creative Talent Pipeline, Pathways & (Good) Jobs
- Creative Production & Tools
- Demand & Cultural Participation
- Creative Places & Infrastructure
- Access to Capital, Funding Sources, & Payment Mechanisms
- Marketing, Promotion, & Engagement
- Channels & Distribution



Creative Economy Framework

We asked participants to provide feedback on the framework, share how they define the creative economy in their own work, and suggest potential amendments. Additionally, participants were asked to identify possible interventions and focus areas within these categories.



Framework: Reactions and Amendments

Participants proposed visualizing the creative economy's dynamic, interconnected nature, while debating how to define it. Though the project's legislation mandates an economic focus, discussions emphasized the need to look beyond traditional economic metrics when assessing creative value.

Examples of how they framed the tradeoffs:

- **Working within today's system:** Economic framing can open opportunities. For instance, Upstart Co-Lab's [definition](#), [explanation](#), and [NAICS codes](#) of creative economy are designed to be clear to investors and policymakers, and can bring resources to the many artists, particularly those without generational wealth, who are facing genuine economic struggles. Many creatives resist viewing their work in financial terms, potentially overlooking valuable opportunities.
- **Benefits of going beyond economics:** However, the legislation's broad scope and long-term perspective enables us to question traditional economic frameworks and explore more expansive possibilities. Another participant pointed out that some scholars argue that "creative economy" frameworks inherently promote neoliberal values, referencing "[Cultural and Creative Industries](#)" by David Hesmondhalgh, "[Policy or Practice? Deconstructing the Creative Industries](#)" by Philip Drake, "[The political economy of 'creative industries'](#)" by Hye-Kyung Lee, and "[From Cultural to Creative Industries](#)" by Nicholas Garnham.

Participant Quotes

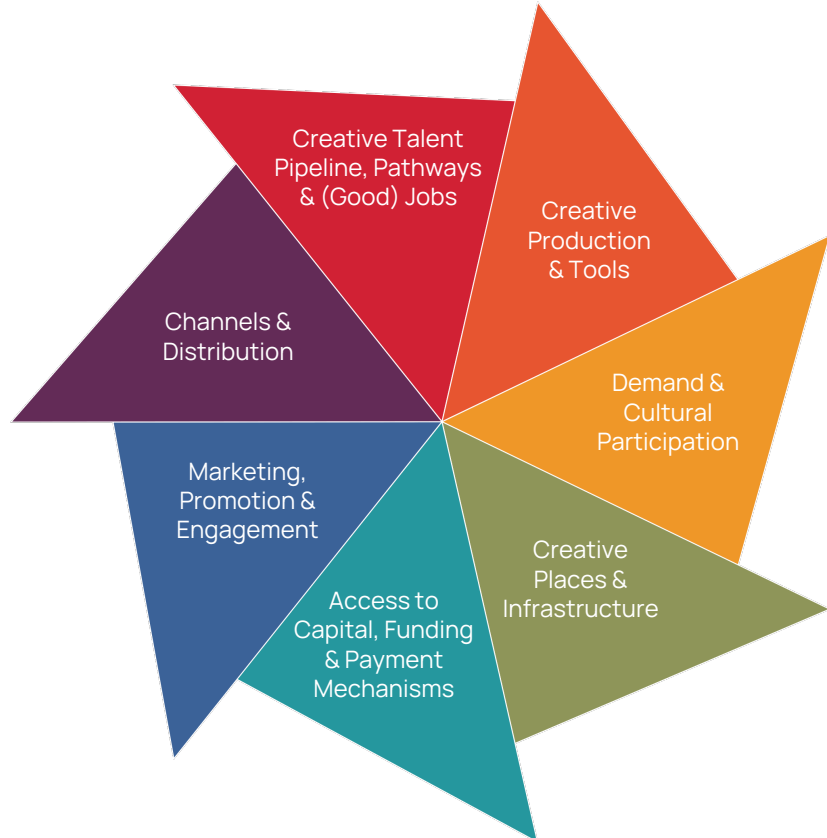
“ How do we bust out of the shell of the pre existing terms? The minute we accept the framing/language of the market we are forfeiting something.”

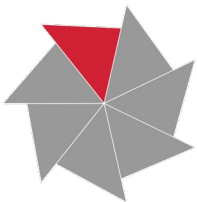
“It is difficult because we have to learn how to wear business hats, and that's been a really hard thing as an artist.”

Creative Economy Domains

The following slides present experts' suggestions for these categories:

- Creative Talent Pipeline, Pathways & (Good) Jobs
- Creative Production & Tools
- Demand & Cultural Participation
- Creative Places & Infrastructure
- Access to Capital, Funding Sources, & Payment Mechanisms
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Creative Talent Pathways, Pipeline, and (Good) Jobs

People are worried about the future of California's media industry

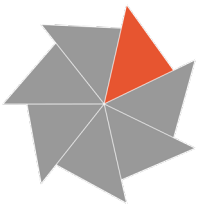
- Industry insiders reported widespread concern about film/television's future. While the "death of Hollywood" could yield better production and distribution models, participants warned of serious downsides - from lost union jobs to the erosion of shared cultural narratives.

Participant Quote

“ *Markets for arts and culture are in free fall compared to 10 years ago, this is not run of the mill change, foundations are shifting.* ”

A “good” job is not (only) about money

- Experts emphasized that competitive wages and benefits, while essential, are not sufficient. Creative workers also seek meaningful impact, job security, and professional recognition.
- Many artists prioritize community service over product sales, using art for health interventions and community resilience. Yet support programs focus primarily on art-to-market pathways, overlooking artists' broader roles in the cultural ecosystem.
- One expert cited a media training program for youth of color that focused on placing its graduates with production companies under BIPOC leadership.



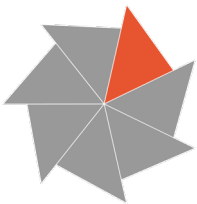
Creative Production and Tools

Emerging tools may diminish the importance of place/physical location

- Once work can be mobile, it will be, one expert argued. Rather than trying to control where production happens, California should focus on maintaining Hollywood and the state as a vibrant creative hub that attracts creative talent to live there. predicted.

Generative AI is advancing rapidly, but its impacts on jobs are still unclear

- Tools like [LumaAI](#) – a generative AI platform for creating and editing 3D content – demonstrate the rapid advancement of text-to-media capabilities. As these technologies make image, audio, and video creation more accessible, they could disrupt traditional creative fields like film, illustration, and music. The pace of breakthroughs suggests major changes ahead.
- Some experts caution against overestimating generative AI's impact. A [Goldman Sachs](#) report highlights several skeptical viewpoints. Historical examples are instructive: when desktop publishing emerged in the 1980s, many predicted professional graphic design would vanish. Instead, the field adapted and grew. This suggests that while generative AI will reshape creative industries, it may not displace professional creators as dramatically as predicted.



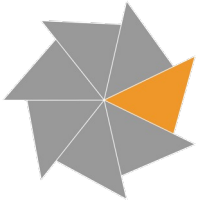
Creative Production & Tools (cont.)

AI's impact on California's creative economy goes beyond job losses

- Some participants speculated that even if overall job loss is not significant, AI tools could diminish the quality of jobs and push down wages in creative industries. They may also fundamentally alter how society values creative work.
- There's a risk that AI-generated content could lead to cultural uniformity, reducing California's artistic diversity. Issues of algorithmic bias and unfair exploitation of artists' work remain significant concerns.
- One participant shared [a report by Salzburg Global](#) that compiled perspectives on these potential threats and proposed solutions
- The environmental cost of running AI systems, particularly their high energy consumption, adds another layer of concern.

AI can benefit creative workers – under specific conditions

- While AI technologies naturally tend to be deployed in ways that disadvantage workers in our current economic system, workers aren't powerless to shape AI's implementation. The [2023 Writers Guild strike](#) demonstrated how organized labor can negotiate the terms of AI adoption in their industry. This suggests AI-related challenges could actually spark broader discussions about workers' rights and working conditions, both in creative fields and beyond.
- Experts cited examples of how AI has been (or could be) used as a way of empowering marginalized communities. Indigenous artists have used AI to create games in their native languages, showing how the technology can help preserve and transmit cultural heritage to future generations.



Demand & Cultural Participation

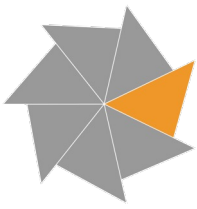
The ability to produce content is expanding, people's ability to meaningfully consume is not

- An industry veteran observed a cycle where new distribution methods (from cable to streaming) emerge, leading to content oversaturation. Consumers then realize they're overwhelmed with subscriptions, triggering industry consolidation. Tech companies' focus on rapid user growth has intensified this cycle, especially as tech and media companies merge.
- Other experts suggested a growing resistance to the "attention economy" may be emerging. Traditional entertainment (movies, TV, music) and new media (social media, short-form videos) increasingly compete for limited user attention, creating digital overwhelm. Recent laws restricting teen social media use might signal a broader future pushback against this intense competition for users' time.

- Similarly, more marginal, but growing, movements to cultivate attention are also emerging, which can be seen in things like the [Strother School of Radical Attention](#).

Demand for diversity and international content is increasing

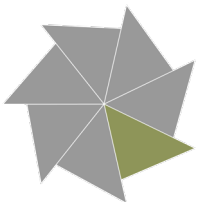
- When diverse media reaches audiences – whether international content or stories from marginalized groups - it creates a self-reinforcing cycle. As viewers discover these perspectives, they demand more, driving increased production of diverse content.



Demand & Cultural Participation (cont.)

Positive externalities of arts could become a new driver of demand

- Several experts cited the importance of artistic or creative ways of thinking outside of arts and entertainment. They gave examples such as the [Guggenheim's "Learning Through Art" curriculum](#), and the creativity class taught to life science majors, by Sue McConnell and [Andrew Todhunter](#).
- There are many documented mental health (and even physical health) benefits to engaging with the arts. Participants suggested that these benefits could be leveraged to meet the serious health challenges experienced by many populations across the state. One expert shared the example of [Art Pharmacy](#), a program in Massachusetts, in which a health care provider can write an "art prescription" for a patient and then a "care navigator" will work with them to choose a suitable activity to participate in, from The Mass Cultural Council's network of 350 arts organizations.
- Evidence suggests arts education correlates with better outcomes in other fields - for example, police officers with liberal arts backgrounds show lower rates of violent incidents.
- Arts and entertainment can unite people through shared cultural experiences, potentially reducing social division. This social benefit, along with media diversity's role in breaking down stereotypes and building empathy, could justify increased arts funding.



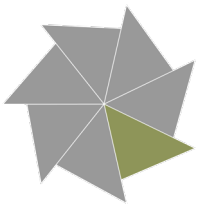
Creative Places & Infrastructure

Recognizing the importance of physical places and interactions

- Many participants highlighted the importance of face-to-face interaction, collaboration, and community-building, arguing that youth, in particular, have no disposable income but need access to spaces to get together and connect.
- The decline of office space and commercial real estate presents opportunities to repurpose empty buildings for community use. San Francisco's [Vacant to Vibrant](#) program shows how empty spaces can be transformed for public benefit.

Gentrification's increasing salience

- As housing concerns grow, gentrification faces increasing scrutiny. Cities like Barcelona and Amsterdam, where residents [resist overtourism and displacement](#), may signal future trends in urban development conflicts.
- Participants pointed to “anti-gentrification” initiatives such as the [CLTRE Keeper First Time Home Buyer program](#), aimed at supporting artists and other residents of gentrifying neighborhoods to buy homes and the efforts of the [Si Se Puede collective](#) as example responses.



Creative Places & Infrastructure (cont.)

Any California creative economy strategy must recognize that rural areas have distinct challenges and assets that differ from urban centers

- Urban economic models and state programs like "high-road jobs" often don't fit rural realities, where economic conditions and standards differ significantly.
- Rural areas offer natural beauty, affordability, and a slower pace that could attract urban residents, but currently lack the cultural spaces many city dwellers expect — a gap that, if filled, could boost rural development.



Access to Capital, Funding Sources, & Payment Mechanisms

The “financialization of everything” is hurting California’s creative economy

- One expert shared substantial research indicating that the increase in private equity and hedge fund involvement in entertainment has reduced funding for artists and creative risks. This financialization diverts money from artistic investment toward financial maneuvers like stock buybacks, reflecting a broader trend across industries.

Impact investing is growing as a source of funding

- Impact investing is a growing industry, representing trillions of dollars. One expert argued that workers and organizations in the creative economy are eligible for such investment, and that increasing their visibility to potential investors could be a viable funding strategy, citing Upstart Co-Labs as an example.



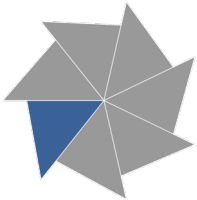
Access to Capital, Funding Sources, & Payment Mechanisms (cont.)

Philanthropic funding can be idiosyncratic and out-of-step with the needs of artists and arts organizations

- Arts funding typically requires meeting specific program metrics defined by funders, with little support for operations or R&D. Organizations must often seek support from outside the arts sector due to limited arts-specific funding.
- One expert explained that museums increasingly rely on a few wealthy donors who prefer funding buildings that bear their names. This leads to oversized facilities while core needs – staff salaries, education programs, and small community organizations – remain underfunded.

Artists need universal basic assets—and innovative programs are helping them get it

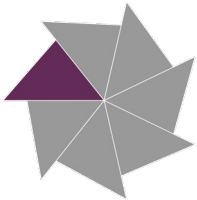
- In many cases, the production of art itself does not require significant capital, but artists do need their basic needs met to give them the time and energy to do creative work. Experts mentioned [ArtBuilt in New York](#), where the Economic Development Corporation owns buildings and rents to artists at below market rates, and [Creatives Rebuild New York](#) as examples of how this can be provided.



Marketing, Promotion, & Engagement

The new gatekeepers: algorithms and categories

- Content algorithms now heavily influence creative success, requiring artists to focus on social media and algorithm-friendly content. While this can boost visibility, it often forces creators to compromise their artistic vision - similar to how sponsored content supports but potentially undermines journalism.
- While experts supported the aims of DEI efforts in arts and media, some raised concerns that current DEI metrics can force artists to fit into rigid categories. This system values "preserving tradition" but often overlooks "creating tradition" or "future-making" activities, pressuring artists to conform to established cultural categories rather than forging new paths.



Channels & Distribution

Proliferation of channels is increasing fragmentation

- Several experts noted that the shift from broadcast media to personalized content platforms has fractured our shared cultural narratives. While offering more diverse voices and choices, this fragmentation may weaken social bonds previously built through common media experiences.

Unmediated experiences are an important emerging media format

- In an era of digital streaming, unique in-person experiences are gaining special value. Success stories like [Meow Wolf](#), [Luminous Streets](#), and [The Joy Ride](#) show a growing appetite for place-based, interactive entertainment that can't be replicated through screens.

Donors are hesitant to embrace new distribution channels

- One expert raised concerns that philanthropic and public funders were hesitant to embrace new media channels and risk being left behind.



Visions for the Future of California's Creative Economy

Creativity and Art Integrated into Everything

Arts and creative activities generate broad social benefits, improving public health, civic engagement, and community bonds

Experts envision a future where creativity would be highly valued across society – by government, citizens, and industry. These cultural forces would be seen as essential tools for multi-solving complex, interconnected challenges facing both the state and the world.

Here's how one participant described the issue:

“ *Why aren't our healthcare systems more like the flow of a poem?
Why are financial systems not choreographed like a dance?
Creative modalities are present, but ephemeral in all our systems.
This is a reason our systems lack imagination and are eroding.
Because we take this idea of a creative ecology, but we otherize it.*

In this aspirational vision of the future, the goal is to weave art and creativity into every sector and system.

A Creative Economy Toolkit

One participant proposed creating a systematic toolkit to help communities develop thriving creative economies:

“ *A suite of tools to help grow and sustain local creative ecologies, such as access to working capital for local creative businesses, planning grants to local government agencies, diagnostic tools to help understand the potential, data collection support, funding for local artists and nonprofits to purchase property. It embeds art in K-12 and in community college and four-year programs, as well as many aspects of public service. This feeds a new narrative of the centrality of arts, and private industry also applies arts and creative thinking principles in more holistic, long-term approaches to problem solving.*

State-Owned, Community-Controlled AI and Other Tech

Experts saw potential benefits of AI for creative workers, but emphasized the need for government oversight - with suggestions ranging from regulatory frameworks to a state-run "public option" for access to AI and other emerging technologies:

“ *A bold, well-resourced call for California communities and schools to develop stories about the history of their place and lands, using the newest generative AI tools available, as a way to face our history and become more rooted as communities as we look forward towards the next 50 years. Young people get trained to learn the new generative AI and augmented reality tools (and prepare for the next creative industry jobs) to do the collective work of rebuilding historical memories and places that they live.*

A new platform for discovery, where algorithms push obscure content instead of snowballing popular content, bringing exposure (and livelihood) to a wider range of artists.

Supporting Arts With a More Empowered State

Participants identified untapped policy tools to support creative sectors - from using eminent domain for arts spaces to reclassifying certain industries as public utilities or restricting corporate practices like stock buybacks.

While these ideas seem radical today, shifting attitudes around AI and worker rights could make such policy proposals more politically viable in the coming decade.

While the creative economy's long-term benefits may warrant state funding of risky projects, experts emphasized the need for mechanisms ensuring public returns on investment - avoiding past scenarios where private companies reaped the credits and profits from state-funded research.

About This Project

This report is part of Institute for the Future (IFTF)'s collaboration with the Creative Economy Workgroup (CEW) and the California Arts Council (CAC). It represents a synthesis of IFTF's review of existing information related to the creative economy. It is based on available studies, reports from government agencies, and a review of existing programs, as well as on the suggestions and inputs of CEW members. That said, it does not represent the views of either the CEW or the CAC. It will be used as an input into the ongoing work between IFTF, CAC, and the CEW to develop a strategic planning document for California's creative economy.

About IFTF

Institute for the Future (IFTF) is the world's leading futures organization. For over 50 years, businesses, governments, and social impact organizations have depended upon IFTF global forecasts, custom research, and foresight training to navigate complex change and develop future-ready strategies. Our mission is to prepare the world to create better, more equitable futures by disrupting short-term thinking with visions of transformative possibilities. Institute for the Future is a registered 501(c)(3), women-led, nonprofit organization based in Palo Alto, California. iftf.org

