



2024

Cultural Infrastructure Index



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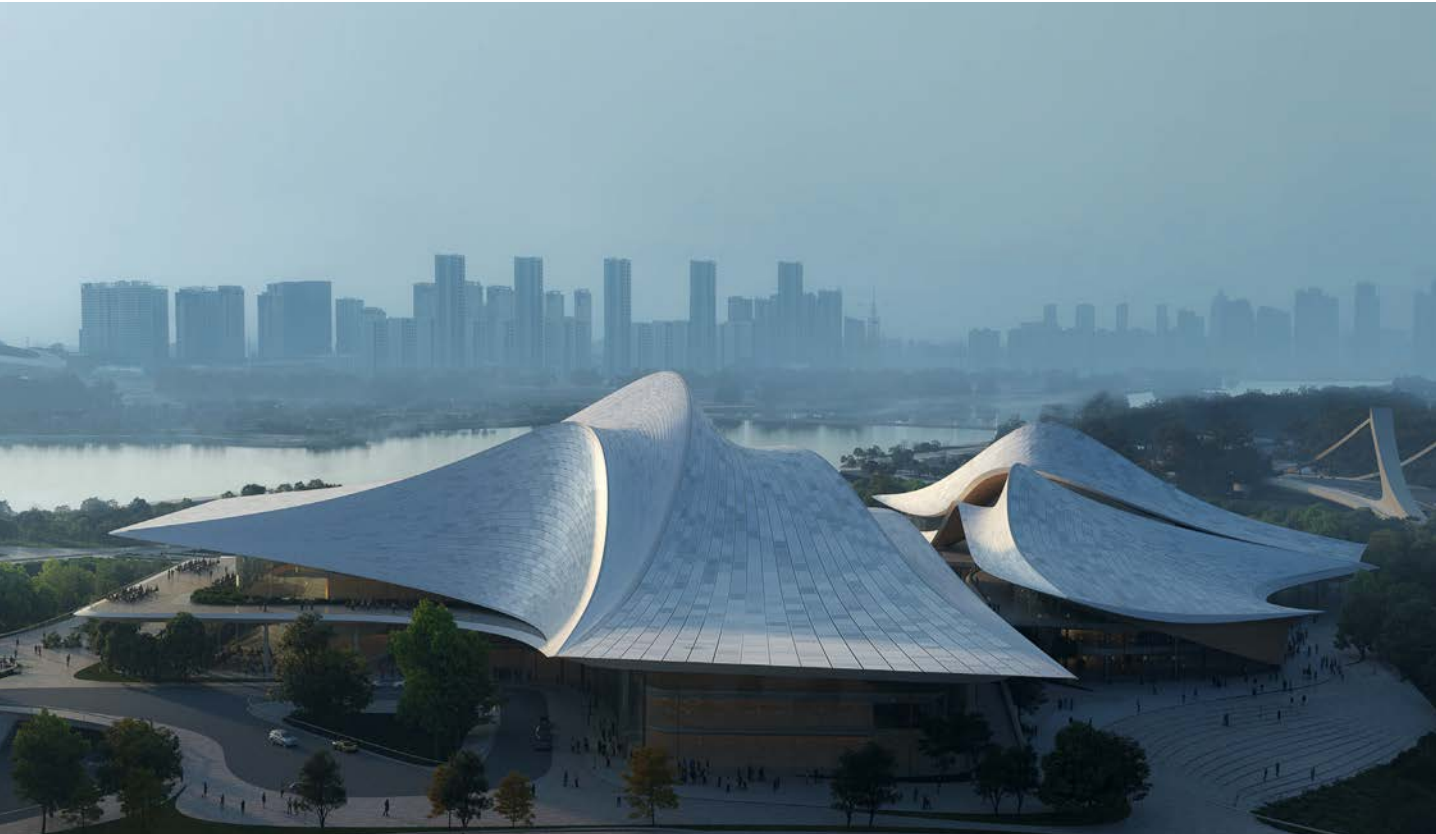


Above:
Simple Art Museum, Hefei

Front Cover & Left:
La Nube STEAM Discovery Center, El Paso, TX



Introduction



This is the ninth edition of the annual Cultural Infrastructure Index published by AEA Consulting.

The Cultural Infrastructure Index seeks to measure investment in capital projects in the cultural sector globally, identifying projects with a budget of US\$10 million or more that were announced publicly or completed within a calendar year.

For the purpose of this Index, “cultural infrastructure” comprises museums and galleries, performing arts centers, multifunction arts venues, immersive arts venues, and cultural hubs or districts. Types of projects tracked include new buildings, renovations, expansions, and adaptive reuse.

This year’s index tracked a total of 334 cultural infrastructure projects worldwide, 48% of which were completed in 2024 and 52% announced as planned new builds, renovations, expansions, and adaptive reuse facilities. The project budgets were available for 233 (70%) of the 334 tracked projects, amounting to a \$6.1 billion investment in completed

projects and \$8.3 billion for planned projects announced in 2024.

The value and volume of completed projects decreased by 29% and 17%, respectively, compared to the value and volume of completed projects tracked in the previous year. The value of announced (planned) projects is showing an increase of 48%, while the volume of those is 12% less than in the previous year, with a 34% increase in median budget per announced project compared to projects announced in 2023. The median project budget for all completed projects tracked in 2024 is \$31M (an increase of about 3% on 2023 median budget figure) and for announced projects it is \$33.4M (an increase of 33% on 2023). However, the longer-term trend (2017 to 2024) tracks a reduction of 2% in the median project budget figure.

Looking at long-term trends, the volume of completed infrastructure projects increased at an average rate of 4% annually (2016-24 CAGR), while the nominal value of year-on-year investment grew at an average rate of 2% annually over nine years.

Museums and galleries remained the most prevalent building types for the ninth consecutive year, accounting for 209 announced and completed projects (63% of total), valued at \$8.8 billion for 144 museum projects with announced budgets. Among the large-scale museum projects completed in 2024 are the Grand Egyptian Museum in Giza with a total capital cost of the region \$1 billion; Audeum in Seoul (\$150 million capital cost); and the Museum of Modern Art in Warsaw (\$109 million). Performing arts centers and facilities are the second most popular type of cultural buildings tracked in 2024 (57, 17% of total), with half of these being renovations of existing theaters and auditoriums.

Geographically, 48% of the projects tracked by this year’s Index are located in North America, 27% – in Europe, 16% – in Asia, with the remaining 10% in the rest of the world.¹ 27% of tracked projects are located in “global cities”, i.e. large urban centers, including 14 in New York, 8 in London, 6 in Los Angeles, 4 in Vancouver, and 3 in Taipei.² The highest

number of newly-built cultural facilities was tracked in the USA (62 or 38% of all new projects), China (19 or 12%), United Kingdom (14 or 9%), Canada (8 or 5%), and South Korea (7 or 4%).

Looking at a longer-term trend, over the past seven years of tracked cultural infrastructure data (2017 to 2024), the value of capital investment decreased by a compound rate of 3% and the total volume of projects increased by 5%. There has been a 10% increase in the volume of planned and completed museum buildings and a 7% decrease in cultural districts and hubs. The value (capital budgets) of tracked cultural districts also decreased by 21%.

AEA Consulting highlighted three themes from this year’s index, explored below: approaches to designing museums for children, the cultural infrastructure-led creation of the public realm, and a spotlight on innovative new cultural facilities in Seoul. We look forward to continue monitoring these and future trends in 2025 and beyond.³

¹ This is largely reflective of the US\$10 million or more budget threshold used to track projects in this index. Cultural infrastructure projects globally vary greatly in their scale and budgets.
² Kearney, *2024 Global Cities Report*, <https://www.kearney.com/service/global-business-policy-council/gcr/2024-full-report>.

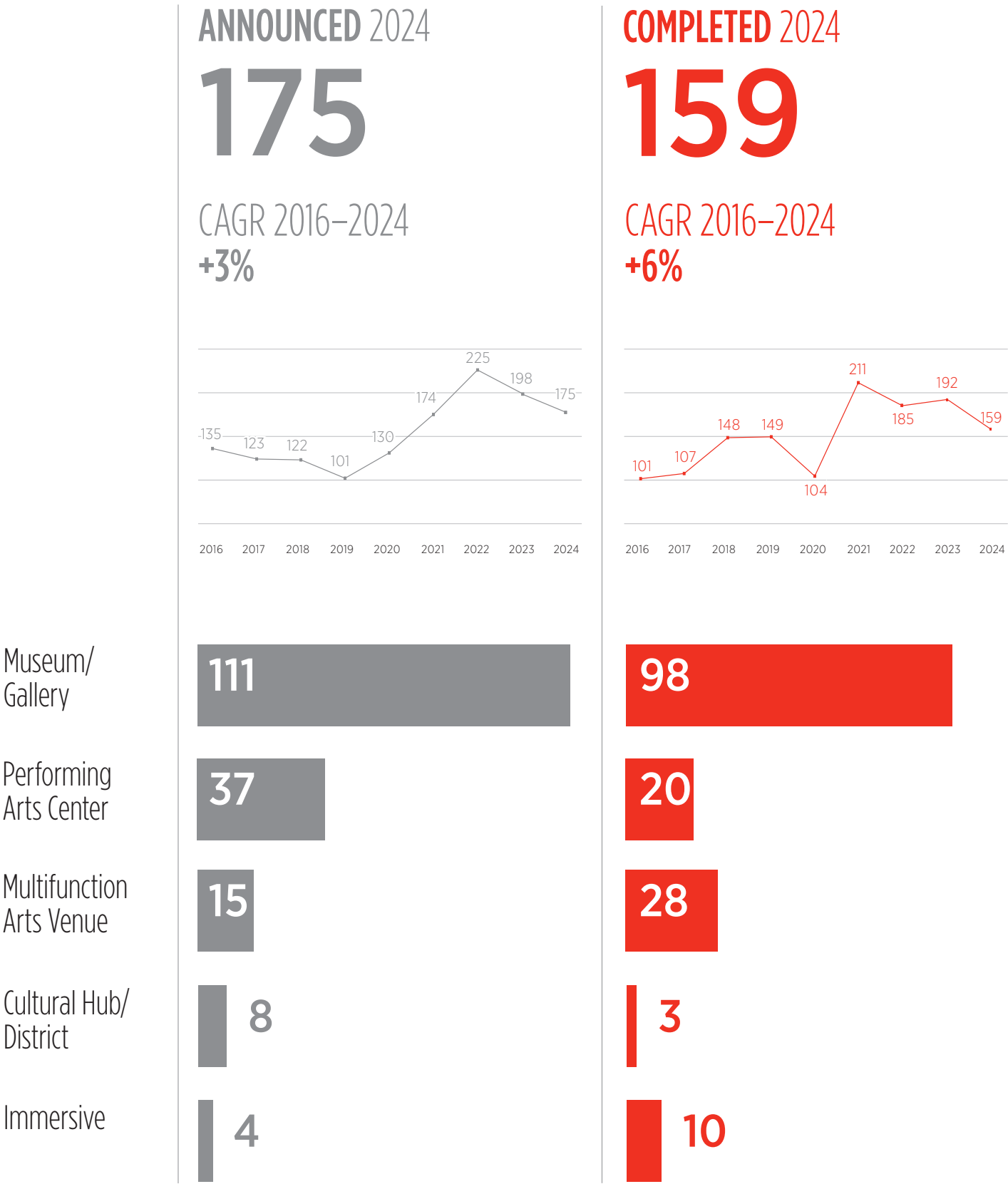
³ The Cultural Infrastructure Index 2024 dataset can be provided on request by contacting AEA Consulting at research@aeaconsulting.com.



Above:
Museum of Modern Art, Warsaw

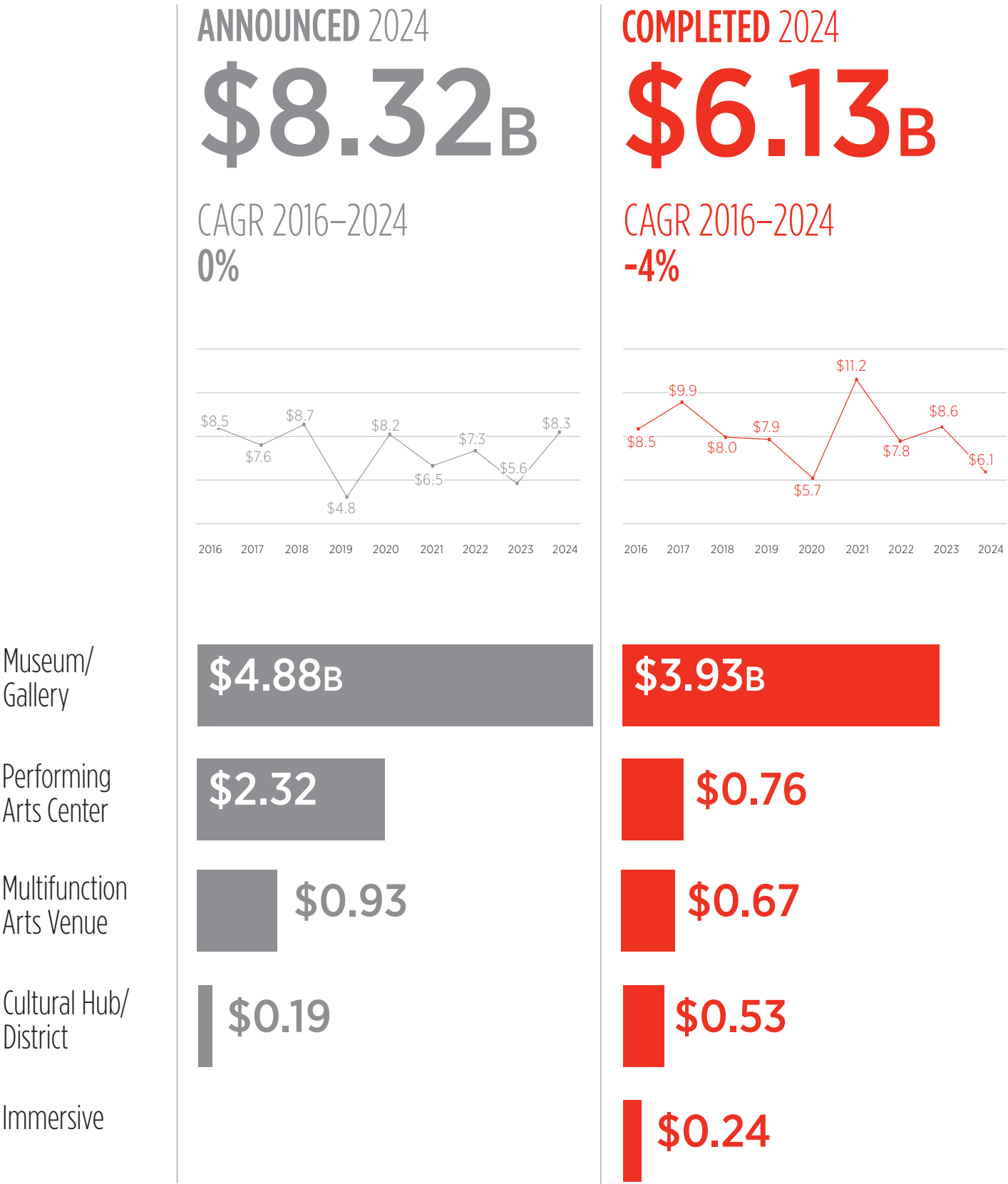
Facing:
Cao'e River Culture and Art Center, Shaoxing City

TOTAL PROJECT NUMBERS



This summary analysis encompasses only publicly-shared projects with disclosed budgets (70% of the dataset) and sizes (61% of the dataset). The full dataset can be made available upon request from AEA Consulting via research@aeaconsultig.com.

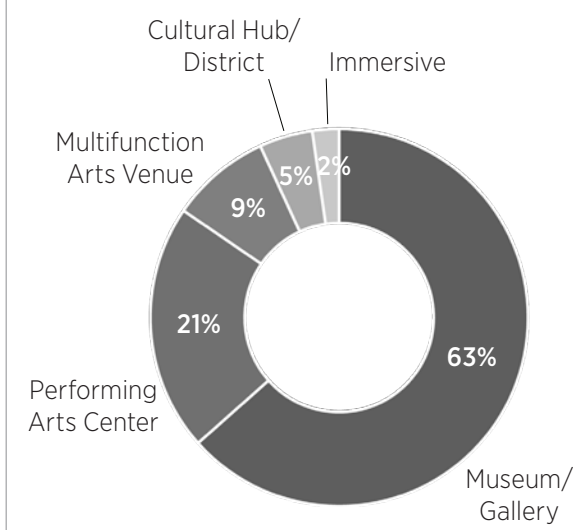
TOTAL CAPITAL INVESTMENT



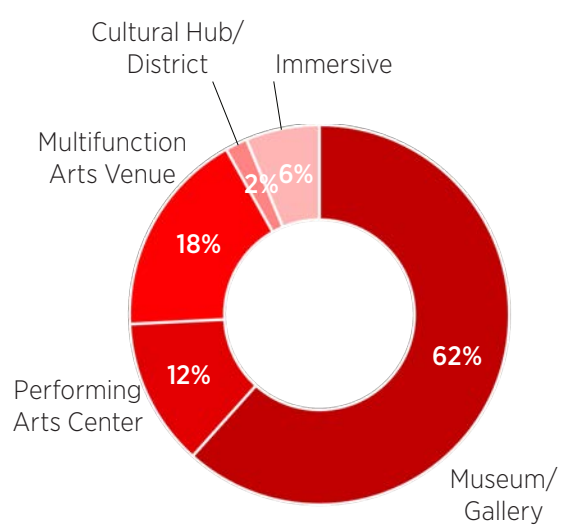
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MIX OF PROJECTS BY BUILDING TYPOLOGY

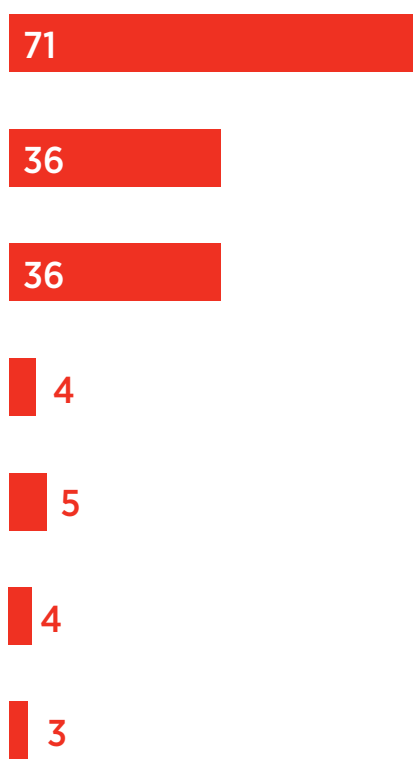
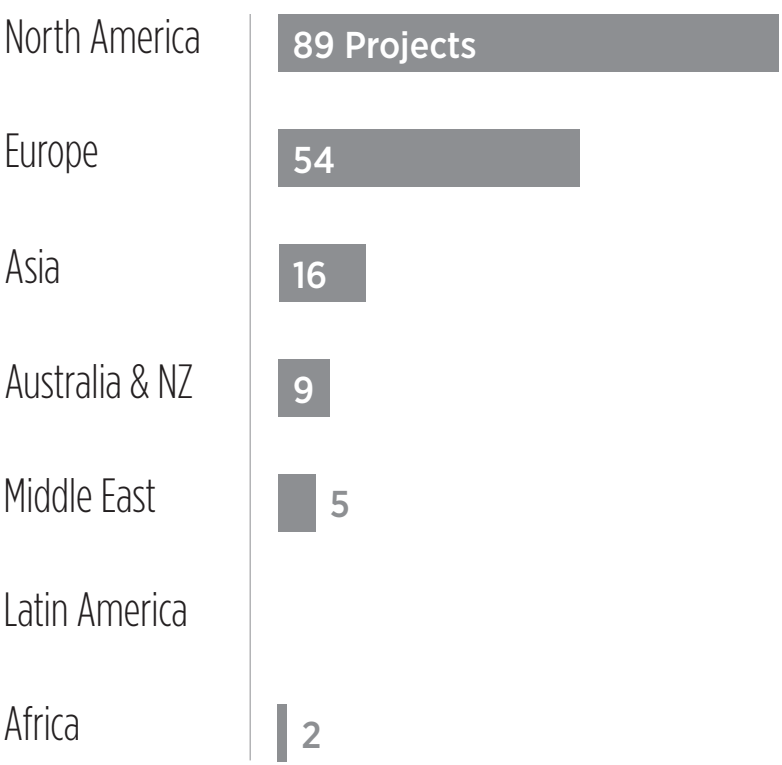
ANNOUNCED 2024



COMPLETED 2024

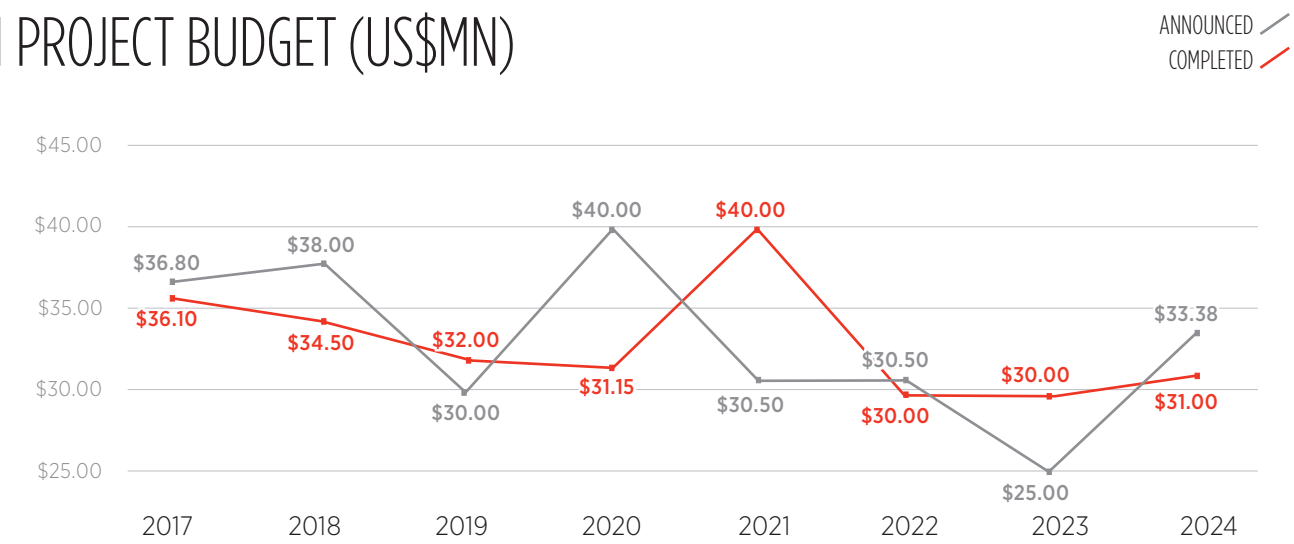


MIX OF PROJECTS BY REGION

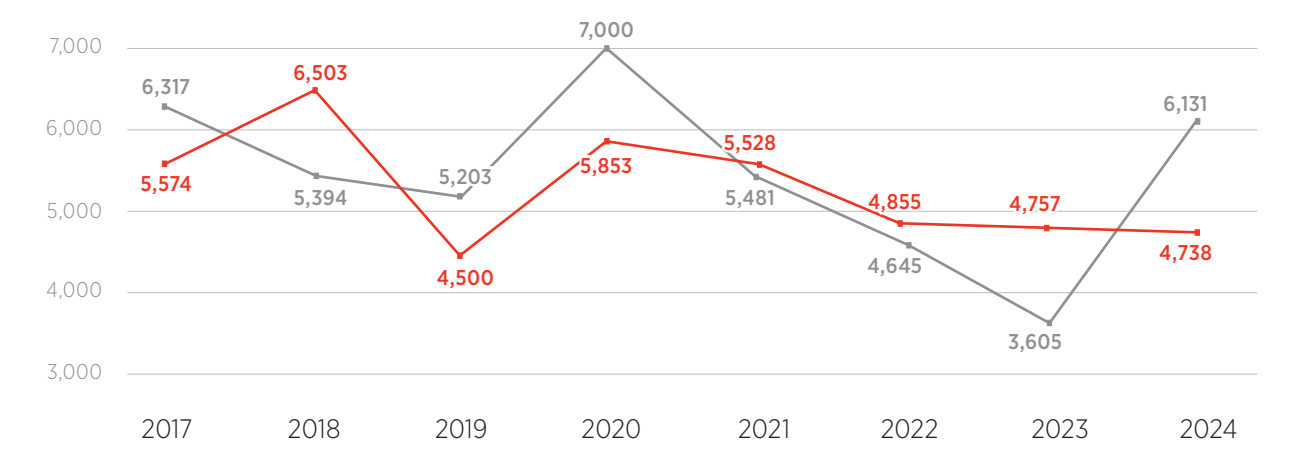


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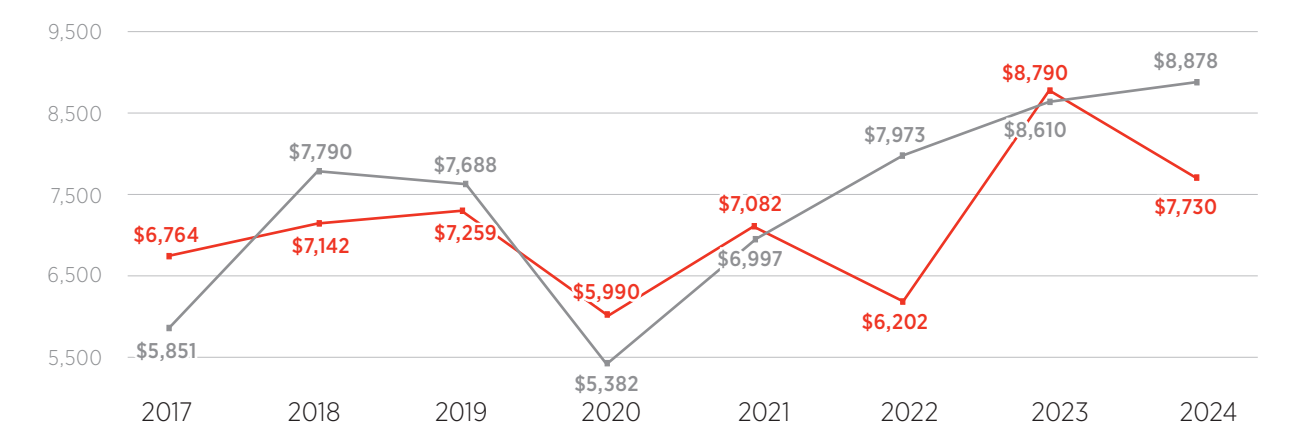
MEDIAN PROJECT BUDGET (US\$MN)



MEDIAN PROJECT SIZE (SQM)



MEDIAN COST PER SQM (US\$)



This summary analysis encompasses only publicly-shared projects with disclosed budgets (70% of the dataset) and sizes (61% of the dataset). The full dataset can be made available upon request from AEA Consulting via research@aeaconsultig.com.

TOP 10 BUDGETS FOR ANNOUNCED PROJECTS

Name	Budget	City/State	Country	Region	Building Type
The Metropolitan Museum of Art	\$500,000,000	New York, NY	USA	North America	Museum/ Gallery
Portland State University Auditorium	\$358,000,000	Portland, OR	USA	North America	Performing Arts Center
The Frisco Center for the Arts	\$340,000,000	Frisco, TX	USA	North America	Multifunction Arts Venue
Children's Museum of Manhattan	\$300,000,000	New York, NY	USA	North America	Museum/ Gallery
London World War II Tunnels	\$277,904,000	London	UK	Europe	Multifunction Arts Venue
Columbus Symphony Orchestra Concert Hall	\$275,000,000	Columbus, OH	USA	North America	Performing Arts Center
Virginia Museum of Fine Arts	\$261,000,000	Richmond, VI	USA	North America	Museum/ Gallery
Museum of Exploration	\$250,000,000	Washington, DC	USA	North America	Museum/ Gallery
Keller Auditorium	\$236,000,000	Portland, OR	USA	North America	Performing Arts Center
Abravanel Hall	\$200,000,000	Salt Lake City, UT	USA	North America	Performing Arts Center



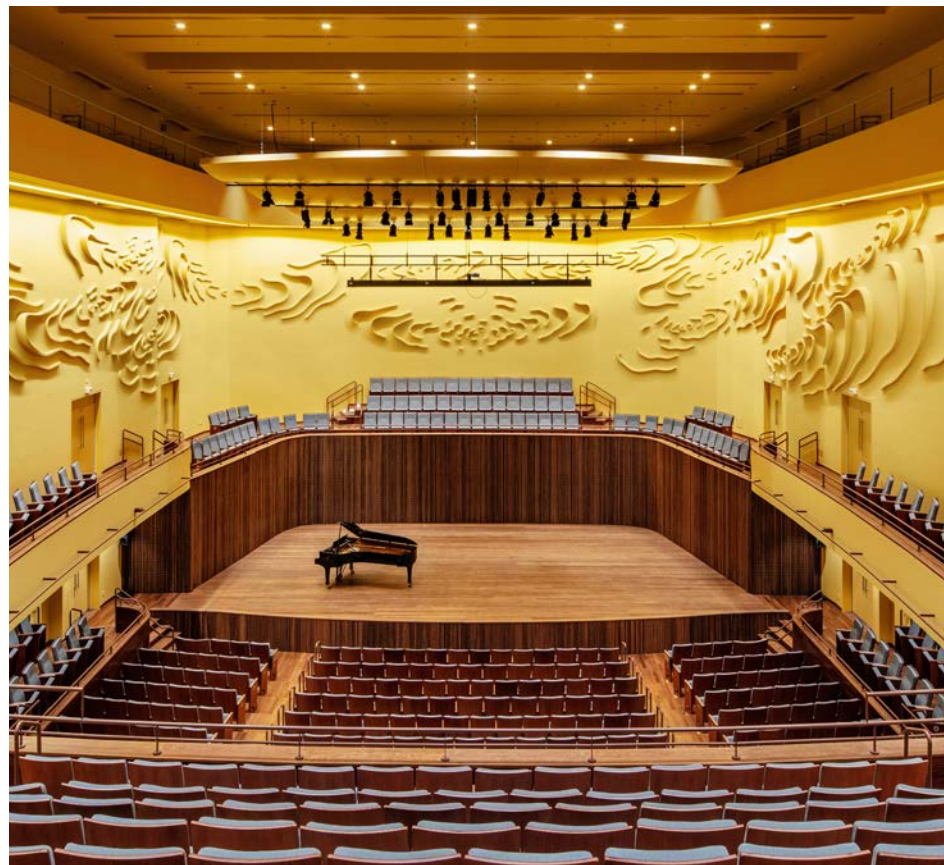
Interior rendering of The Metropolitan Museum of Art's Tang Wing

TOP 10 BUDGETS FOR COMPLETED PROJECTS

Name	Budget	City/State	Country	Region	Building Type
Grand Egyptian Museum	\$1,000,000,000	Giza	Egypt	Africa	Museum/ Gallery
East Kowloon Cultural Centre	\$515,000,000	Hong Kong	China	Asia	Performing Arts Center
Paleozoological Museum of China	\$234,000,000	Baoding	China	Asia	Museum/ Gallery
Cleveland Museum of Natural History	\$150,000,000	Cleveland, OH	USA	North America	Museum/ Gallery
Audeum	\$150,000,000	Seoul	South Korea	Asia	Museum/ Gallery
Yinxu Museum	\$146,000,000	Anyang	China	Asia	Museum/ Gallery
California State University San Bernardino Performing Arts Center	\$127,000,000	San Bernardino, CA	USA	North America	Performing Arts Center
San Diego Symphony Jacobs Music Center	\$125,000,000	San Diego, CA	USA	North America	Performing Arts Center
Museum of Modern Art	\$109,000,000	Warsaw	Poland	Europe	Museum/ Gallery
National Theatre Nigeria	\$100,000,000	Lagos	Nigeria	Africa	Performing Arts Center



The view of the Pyramids from the Grand Egyptian Museum



Top:
UCCA Clay, Yixing

Bottom:
Teatro Cultura Artística, São Paulo

Top:
San Diego Symphony Jacobs Music Center, San Diego

Bottom:
Centre des Cultures et Spiritualités Ewés (rendering), Togo

ANNOUNCED
COMPLETED

North America

89 71

Museum/Gallery	56	34
Performing Arts Center	19	13
Multifunction Arts Venue	8	16
Cultural Hub / District	4	1
Immersive	2	7

Europe

54 36

Museum/Gallery	38	28
Performing Arts Center	9	1
Multifunction Arts Venue	4	6
Cultural Hub / District	1	
Immersive	2	1

Asia

16 36

Museum/Gallery	12	26
Performing Arts Center	1	3
Multifunction Arts Venue	1	4
Cultural Hub / District	2	2
Immersive		1

Vancouver

Museum/Gallery	1	1
Multifunction Arts Venue		1
Cultural Hub / District		1

Detroit

Museum/Gallery	1	
Multifunction Arts Venue		2
Cultural Hub / District	1	

New York

Museum/Gallery	8	
Performing Arts Center	1	1
Multifunction Arts Venue	2	1
Immersive		1

Atlanta

Museum/Gallery	2	
Performing Arts Center	1	
Multifunction Arts Venue	2	

Los Angeles

Museum/Gallery	2	1
Performing Arts Center	1	1
Multifunction Arts Venue		1
Immersive	1	

London

Museum/Gallery	2	2
Performing Arts Center	1	
Multifunction Arts Venue	2	

Shanghai

Museum/Gallery		2
Performing Arts Center		1

Taipei

Museum/Gallery		2
Performing Arts Center	1	

Perth

Museum/Gallery		1
Performing Arts Center	1	
Multifunction Arts Venue	1	

Latin America

0 4

Museum/Gallery		3
Performing Arts Center		1

Africa

2 3

Museum/Gallery		2
Performing Arts Center	1	1
Multifunction Arts Venue		
Cultural Hub / District	1	

Middle East

5 5

Museum/Gallery	2	3
Performing Arts Center	3	
Multifunction Arts Venue		1
Cultural Hub / District		
Immersive		1

Australia & NZ

9 4

Museum/Gallery	3	2
Performing Arts Center	4	1
Multifunction Arts Venue	2	1



Top:
Hilbert Museum of California Art, Orange, CA

Bottom:
Zhejiang Lishui Guyanhuaxiang Art Center, Li Shui Shi

Top:
MALBA Puertos, Belén de Escobar

Bottom:
LANTERN, Detroit

Designing for Play: Children's Museums

Recent investments of over \$550 million in twelve children's museum projects highlight an increased focus on providing cultural and learning spaces for children. This includes renovations and new children's museums in smaller cities, suggesting a shift toward decentralized, high-quality learning environments that support local engagement. Capital project scopes of children's museums vary widely, from smaller, community-driven initiatives to the planned \$300-million new building for the Children's Museum of Manhattan in New York. Emerging trends emphasize specialization, such as STEAM integration at La Nube in Texas or the literary focus of the Rabbit hOle in Kansas City – a new museum AEA Consulting has had an opportunity to advise on business planning and staffing. Children's museums cater to diverse audiences and modes of engagement, and their design briefs need to take into account accessibility and innovative approaches to experiential learning.

Children's museums engage children at different developmental stages through thoughtful design strategies that encourage active play, exploration, and storytelling. Creating immersive and interactive environments is central to fostering engagement and exploration. For example, the Rabbit hOle's in-house team of artists and makers designs life-sized, interactive book-based exhibits, allowing children to physically enter literary worlds. La Nube's STEAM-focused exhibits encourage hands-on learning, e.g. a 50-foot-tall climbing structure where visitors can learn about geometric shapes. Physical elements such as tunnels, fire poles, and climbing structures are deliberately integrated into the museum design to stimulate active play. Additionally, flexible and adaptable spaces allow for workshops and creative activities that evolve over time. Open-ended exploration is also prioritized, with exhibits designed to let children take the lead in discovering stories, themes, and activities that resonate with them.

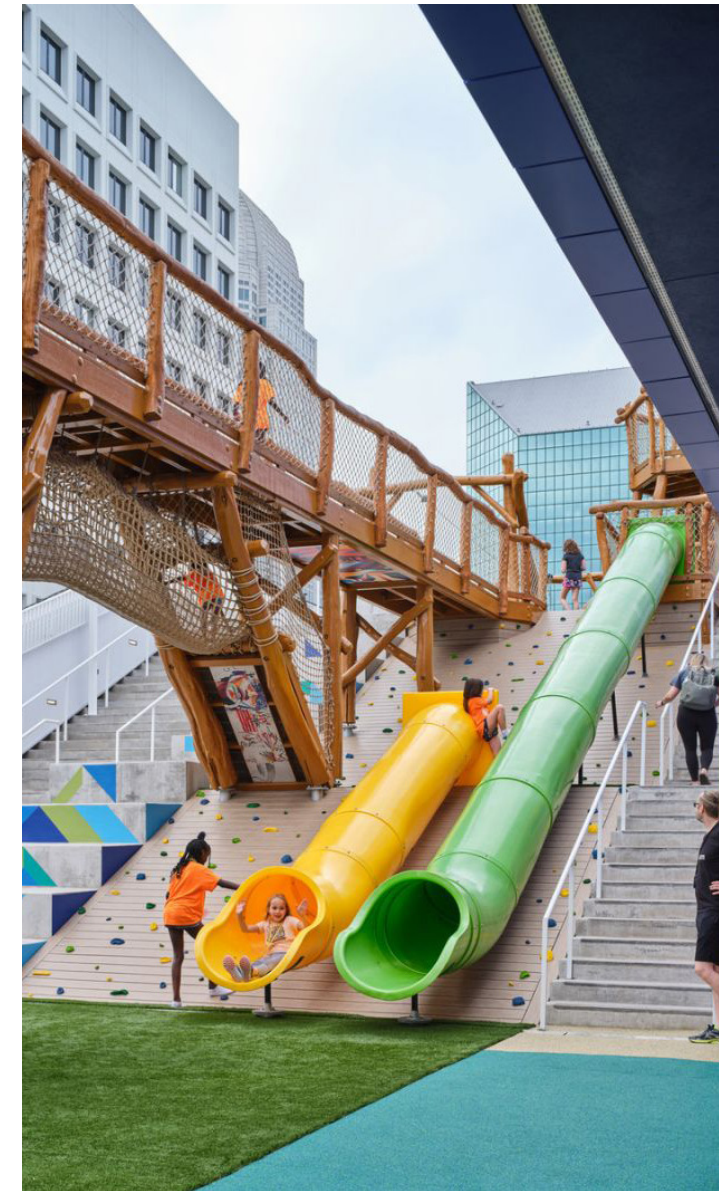
Recognizing diverse sensory needs and learning styles, children's museums are increasingly incorporating sensory-friendly accommodations



to ensure inclusivity. In line with best practices for family-friendly spaces, Kaleideum in Winston-Salem, North Carolina, includes family changing rooms and quiet wellness spaces on every floor for relaxation or breastfeeding. Access accommodations go beyond just physical design, e.g. La Nube provides sensory-friendly kits for children with autism that include noise-cancelling headphones and weighted vests.

Community input and expert guidance are also vital in shaping these spaces, as seen in the Omaha Children's Museum's collaboration with early childhood development specialists. The museum also collaborated with local businesses, nonprofits, and experts to integrate community-driven ideas into its design and programming. The museum prioritized inclusivity by consulting families with children of different abilities during the planning phase. This ensures that adaptations for sensory needs, physical accessibility, and diverse learning styles are integrated into the design.

These recent examples of museums for children show that physical spaces can be intentionally shaped to enhance children's learning, engagement, and overall museum experience. The trend towards more sophisticated and inclusive designs underscores the commitment to creating meaningful and accessible cultural facilities for children.



Above, clockwise:
Kaleideum, Winston-Salem, NC
Children's Museum Of Manhattan NYC (rendering), NY
Omaha Children's Museum (rendering), Omaha, NE

Facing:
Rabbit hOle, North Kansas City, MO

Designing for Public Realms: Cultural Infrastructure Beyond Buildings

In 2024, cultural institutions invested significantly in outdoor public spaces, expanding beyond their buildings to foster civic engagement, accessibility, and environmental stewardship. These substantial allocations show that cultural institutions are seeing their grounds as integral to their operations.

The Natural History Museum in London converted five acres of its grounds into an urban nature project in a \$33 million renovation. The outdoor area was converted into gardens functioning as a living laboratory where scientists can monitor, record, and study urban wildlife, while also serving educational and well-being purposes for visitors. This approach expands the museum’s educational mission beyond its physical walls, creating experiences that connect visitors directly with nature and enhance its environmental sustainability. In a similar move that reimagines exterior spaces, the Centro de Arte Moderna Gulbenkian in Lisbon renovated its gardens and added a canopy, a filter between building and garden, creating a social space for visitors that adds a new way of experiencing culture outdoors.

The National Gallery of Australia’s winning design scheme for its new \$38 million Sculpture Garden focuses on “repairing” the landscape by restoring the site’s ecology and strengthening connections with Country.¹ The architects designed a circuit around the Gallery building, incorporated accessible and inclusive design elements, and added a permanent pavilion. This project enhances exhibition and programming capacity while improving visitor flow and engagement.

A year prior, in 2023, Austin’s Blanton Museum of Art underwent a \$35 million renovation that introduced the Moody Patio: new performance stages, lobbies, shade structures, and seating areas. The design fosters a more pedestrian-friendly environment and incorporates comfortable microclimates, with twelve three-story “petals” providing shade and a rainwater

¹ “Country” refers to the profound Indigenous Australian concept encompassing not merely land, but the intricate web of cultural knowledge, spirituality, customary law, language, kinship, and ancestral connections that bind people to place and to each other across generations.



collection system. These outdoor spaces engage campus audiences iwhile offering more casual entry points to the museum, described as “sophisticated and artful, but not aloof or intimidating,” and aligning with “Austin’s overall vibe.”

These developments in public spaces highlight a trend where cultural institutions increasingly view them not as supplements but as essential to their mission and opportunities: programming that reaches new audiences, additional revenue streams through events and extended hours, and the possibility of phased development that builds community engagement before major capital projects are completed.



National Gallery of Australia Sculpture Garden (rendering), Canberra



Top:
Natural History Museum, London

Bottom:
Centro de Arte Moderna Gulbenkian, Lisbon

Spotlight on Seoul: Innovation in Cultural Buildings

The Audeum: A Multisensory Departure from Traditional Experiences

The Audeum (Audio Museum) opened its doors in Seoul's Gangnam district, reimagining what a museum experience is: it is the world's first audio-dedicated museum where the public can experience visual elements, sound, light, wind, and fragrance, engaging all the senses.

Designed by Kengo Kuma and Associates, the museum focuses on the evolution of audio technology spanning 150 years since the invention of the phonograph in 1877. Its exhibition halls on the second and third floors allow visitors to experience historical sound reproduction through carefully preserved audio systems, while a listening lounge displays approximately 100,000 rare LPs.

Audeum aims to broaden the traditional listening experience by linking historical sound reproduction technology with the wider realm of art.



Top:
The Audeum's façade of overlapping aluminum pipes

Bottom:
Interior gallery



Seoul Robot & AI Museum: Embedding Technology in Cultural Heritage

The Seoul Robot & AI Museum (RAIM) is one of the world's first cultural institutions dedicated entirely to robotics and AI. Situated in Chang-dong Sanggye, it bridges between academic research and public engagement, connecting nearby universities and corporations with the community.

The building's shell, designed by Melike Altinisik Architects (MAA), employs smart systems in the construction process, enabling visitors to learn about robotics or AI within the exhibition content while inhabiting a structure that was partially built by them.

The museum demonstrates how cultural infrastructure can document, showcase, and advance technological innovation while fostering public engagement with the emerging technologies that will shape our collective future.



Top:
The Museum's external shell

Bottom:
Interior gallery

Emerging technologies should not be treated as afterthoughts or add-ons, but as intrinsic components of the design and operational DNA of cultural spaces. Integrating technology at the conceptual stages allows institutions to build environments that are adaptive, interactive, and deeply engaging.

– Melike Altinisik Architects



Top:
The Aatma Manthan Museum, Rajasthan

Bottom:
Kunstsilo, Kristiansand

Top:
Fubon Art Museum, Taipei

Bottom:
Powerhouse Castle Hill, Castle Hill

Credits

With thanks to Luna BuGhanem, Laura Casale, Jess Nickelman, Natalia Vartapetova, and case study contributors.

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AEA Consulting is a global firm setting the standard in strategy and planning for the cultural and creative industries. We are known for our candid and impartial advice that draws on deep knowledge of the cultural sector as well as robust research and analytical insight.

Since 1991, we have successfully delivered more than 1,200 assignments in 43 countries, helping clients around the world plan and realize vital and sustainable cultural projects.

AEA offers a talented, multidisciplinary team of professionals with proven practical experience who deliver personalized solutions to organizations in the arts, cultural, creative, and public sectors. We thrive on new challenges and approach problem-solving with curiosity, creativity, and integrity.

For more information visit:
www.aeaconsulting.com



About the Global Cultural Districts Network

Global Cultural Districts Network (GCDN) is an independent, international association committed to improving the quality of urban life through the contribution of the arts, culture, and creative industries.

The network fosters collaboration and knowledge-sharing among those responsible for creative and cultural districts, quarters, and clusters in widely diverse contexts, providing rich and rewarding opportunities for cross-fertilization and exchange.

The forum engages leaders and opinion formers in culture and urban development through convenings, research, and collaboration to inform global, local, and sectoral agendas.

For more information visit
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