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Arts Index Netherlands 2005-2013

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Second Edition of the Arts Index Netherlands

Key data on the cultural sector 2005-2013 for each pillar and sector

The Arts Index Netherlands was launched in 2013. Two years later, it is time for an update: the index now shows data covering the 2005-2013 period.

In developing the Arts Index, the initiators, the Boekman Foundation (*Boekmanstichting*) and the Netherlands Institute for Social Research (*Sociaal en Cultureel Planbureau*), aimed to provide fact-based input for the societal and political debate about the cultural sector. The index's strength lies in bringing together a broad selection of publicly available statistics on the cultural sector. This is, however, also its Achilles heel. Firstly, the index is dependent on the availability and quality of data. Secondly, numerous choices must be made when compiling data in a model such as the Arts Index. These choices, which are constantly subject to discussion, also create possibilities for a better understanding of the cultural sector. With various parties from within the cultural sector, an ongoing debate is being held about the organisation and interpretation of data since

Cover image: Studio Drift and Buhtiq, *Nola*, 2013 (Dutch Design Week). Photography: Nick Franken

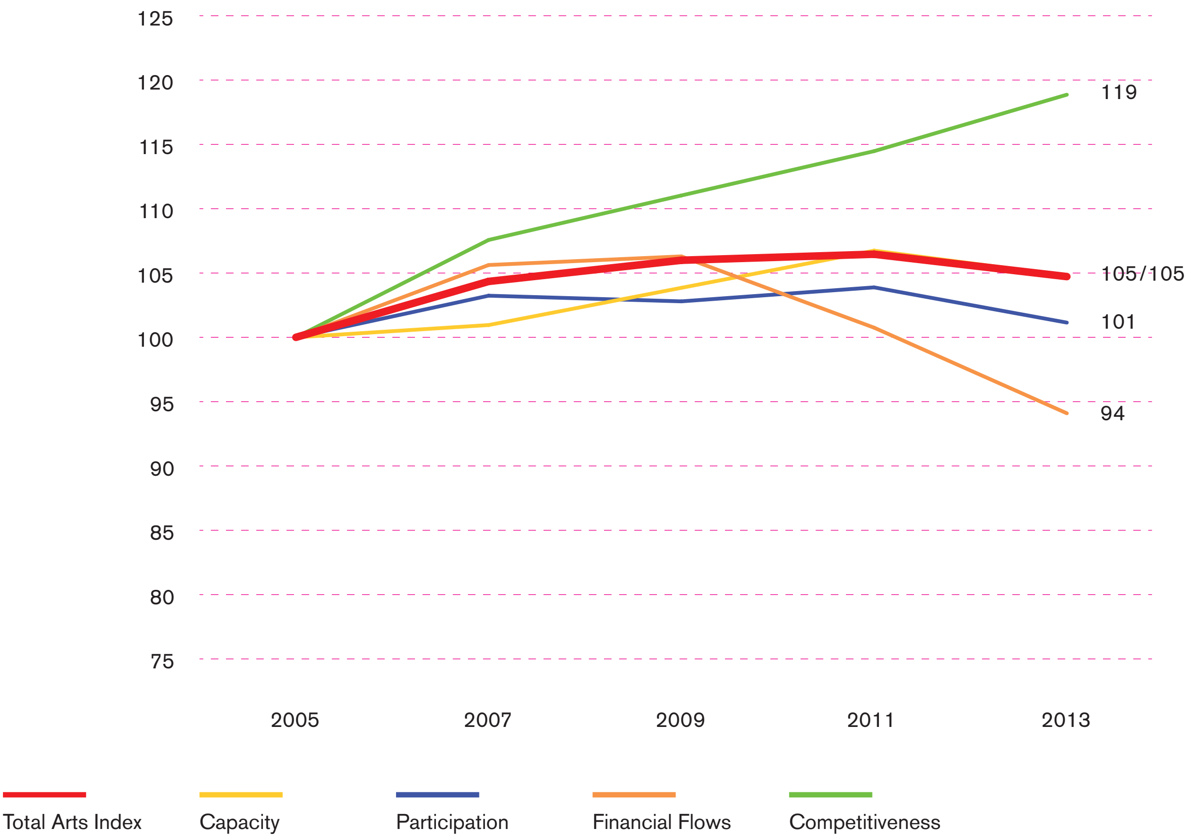

Figure 1. Developments in the four pillars of the Arts Index Netherlands, 2005-2013

Source: Arts Index Netherlands.

the launch of the Arts Index in 2013. The result of this debate, in itself an important by-catch of the index, is that parts of the index have now been calculated differently from the method previously used in *Boekman* 97.[1] Once again, however, the Arts Index categorizes statistics in four pillars referred to as Capacity, Participation, Financial Flows and Competitiveness (which carry equal weights in the index). And again, each pillar is made up of a number of key indicators.

The Arts Index 2005-2013

The second edition of the Arts Index Netherlands contains figures up to the end of 2013. The overall index has fallen by one point since 2011 (see figure 1). A glance at the underlying pillars and key indicators shows which changes lie behind this apparent consolidation. The pillars Participation and Capacity fell slightly since 2011, Competitivenes increased, whilst Financial Flows decreased (by seven points). A further division into key indicators (see Table 1) shows in more detail where these changes occurred (the table in the annex to this chapter contains the indexed data on all the indicators used).

Capacity

Capacity, a pillar consisting of figures on numbers of companies/institutions in the cultural sector, as well as statistics relating to infrastructure and the labour market, fell slightly. The number of companies/institutions decreased due to closures and mergers. Starting in 2005, municipal cuts led to a fall of 35% in the number of arts centres and of over 50% in public library organizations. In the same period, the increase in the number of companies in the creative industry continued. →

		2005	2007	2009	2011	2013
1. Capacity		**100**	**101**	**104**	**107**	**105**
	Infrastructure	100	102	105	108	105
	Organisations / institutions	100	96	95	96	94
	Labour market	100	105	112	117	116
2. Participation		**100**	**103**	**103**	**104**	**101**
	Visits	100	103	104	106	104
	Practise	100	104	95	86	78
	Consumption	100	101	92	80	57
	Volunteering and household donations	100	105	119	144	166
3. Financial Flows		**100**	**106**	**106**	**101**	**94**
	Income	100	108	112	101	93
	Government contributions	100	108	114	110	104
	Turnover creative industries	100	102	93	92	85
4. Competitiveness		**100**	**108**	**111**	**114**	**119**
	National competitiveness	100	114	116	118	126
	International competitiveness	100	101	106	111	112
Total Arts Index		**100**	**104**	**106**	**106**	**105**

Table 1. Pillars and Key Indicators of the Arts Index Netherlands, 2005-2013

Source: Arts Index Netherlands.

This can be partly explained by the introduction in 2008 of the requirement for self-employed people to register in the Trade Register. The actual number of self-employed workers grew as a result of developments in the economy and the labour market (e.g. flexibilization and decreasing economies of scale). Starting in 2011, the infrastructure shrank slightly. Following the closure of a number of libraries, the overall library collection became smaller as a result. In other areas, however, the infrastructure expanded: there are larger cinemas (with on average more screens and seats) and there are more books available. Finally, figures on the labour market show a relatively stable number of jobs in 2011-2013. Around 3% of all jobs in the Netherlands is in the cultural sector, however this is including part-time and/or temporary jobs and self-employed workers.

Participation

The Participation pillar includes the key indicators Visitors, Practice, Consumption and Volunteering and household donations. The overall score of 101 is based on several different developments. The number of visitors to culture and the arts fell slightly; practice and consumption showed a sharp decline, but volunteering and household donations showed growth. The number of library visitors illustrates that a decline in capacity did not necessarily lead to a corresponding decline in participation.

The practice of amateur arts had to settle for less on many fronts. Since 2005, the number of arts centres decreased by 1/3, and the number of participants in arts courses also dropped sharply. The number of members of music/drama/choral groups (amateur art associations) has been declining since 2009, but in 2013 it was still above the 2005 level. People also spent less time on amateur arts practices than in 2007.[2] To develop their talents, young people often find alternative routes by utilising private programmes, the internet and social media.

Paid consumption of culture and the arts decreased sharply; the market for music albums (downloaded and physical) and films on DVD collapsed. These sectors have not (yet?) managed to turn the tide and develop a business model that responds to the challenge of digitisation.

A striking but also somewhat uncertain rise occurred for the new key indicator Volunteering and household donations. The cultural sector has a positive image and has attracted and retained thousands of volunteers. The statistics underlying the Arts Index Netherlands point to a growing enlistment of volunteers for cultural activities, something that has not been confirmed by recent figures from the Netherlands Institute for Social Research/SCP (see Ministry of Education, Culture and Science 2015). This may be explained by the fact that the same people have started to do voluntary work in more than one place, so that there have been more registrations of volunteers, while there are not necessarily more people working for the arts on a voluntary basis. In addition, household donations are viewed as an indicator of support, because they also point to the involvement of the population in culture. However, the strong increase since 2011 should be interpreted with caution, because it is fully accounted for by one major donation in 2013. Without this donation, there would have been no rise in household donations; an entirely different trend, that is more in line with the SCP figures (Ministry of Education, Culture and Science 2015).

The decrease in the number of volunteers working in the performing arts sector after 2011 is related to the considerable decrease in the number of performances in 2011-2013. This decline is in fact more sizable than that in the number of volunteers, so that in relative terms, volunteers became more important (accounting for 20% of all FTEs, in 2005 this was 17%). In this day and age, household donations and volunteers are essential for a thriving cultural sector, which stresses the importance of continued debate on these figures and their meaning.

Financial Flows

Due to governmental and institutional cutbacks, to a decline in the paid consumption of arts and culture as well as to the economic recession in the Netherlands, financial flows in the Dutch cultural sector decreased (see also Vinkenburg 2015). This is the only pillar with a 2013 index figure below the base value of 2005. The total amount of subsidies and government grants decreased from 3,950 million in 2011 to 3,759 million in 2013 (adjusted for inflation). Declining numbers of visitors make it difficult for cultural institutions to respond to the Dutch political appeal to acquire more income from the market. So far, sponsors and private funds have not yet emerged as alternative sources of income (Hamersveld 2015). Museums, on the other hand, appear to have increased their revenues considerably. But a closer look reveals that this is primarily true for larger museums, and especially for those that have reopened in 2013 (Maatjens 2015, CBS 2015). In commercial fields, developments diverge. The cinema sector increased overall box office revenues thanks to rising numbers of visitors and premium pricing for IMAX and 3D showings, while revenues in the music and book markets and the creative industry[3] declined.

Competitiveness

The pillar Competitiveness encompasses the two key indicators National competitiveness and International competitiveness. With an index figure of 119 in 2013, this pillar shows the most positive trend compared to results of the other pillars. This is the result of more successful Dutch films and – most importantly – of the increased export of music by Dutch artists. On the other hand, the international presence of visual arts from the Netherlands declined slightly. A caveat applies to the figures on competitiveness. Indexing implies that when the starting point is low, the index figure is higher. A rising index also ‘pulls up’ the average value of the core indicator and overarching pillar, so to speak. When we leave out the share of the export value of music in the total export value, the index figure for 2013 for the pillar Competitivenes would be 108. This shows a drawback of combining different figures in a single index, but also illustrates the importance of examining figures in detail and placing these in perspective.

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A closer look at cultural fields

Based on the information provided by the Arts Index, we are also able to zoom in on trends and developments within specific cultural fields.

Performing arts

The number of performances in this cultural field decreased from over 66,000 in 2011 to 58,000 in 2013. The number of visitors also declined, but less abruptly than the number of performances. The latter trend emerges especially in the programmes of smaller venues, in the classical genres and in Dutch regions where there are already few performances. In the four largest cities of the Netherlands (Amsterdam, Rotterdam, Utrecht and The Hague) the relatively stable numbers of visitors are remarkable. By contrast, performing arts in smaller municipalities attract fewer visitors. Moreover, the decline in the number of visitors was largest for commercial theatre producers.

Visual arts

Between 2005 and 2013, the visual arts sector declined. There are fewer galleries, these attracted fewer consumers and acquired diminishing revenues. Dutch galleries are also less visible internationally. The international reputation of Dutch visual artists has shown a slight decline since 2011, but is still higher than the level in 2005.

Literature

Book production is sizeable; each year over 16,000 new Dutch titles are published. Although there are fewer public libraries, their decline in numbers has been compensated by mini service points, collection points and self-service libraries. Incomes for authors from copyrights have declined by 35% since 2005. In general, there are substantial changes in cultural consumption, with audiences showing a preference for access to cultural goods (e.g. streaming) rather than buying these products. However, this trend is less prevalent in the book sector than other sectors. In the book sector, digital carriers (e.g. e-books) relatively strongly change the perception and experience of reading a novel. Reading a book takes more time, and therefore subscription services à la Netflix or Spotify are less attractive to readers.

Cultural heritage

The heritage sector is expanding. Not only did the number of visits and volunteers in museums increase, but so did the number of listed historic buildings and protected urban and village areas. In recent years, museums welcomed more visitors than ever before. This upward trend is underlined by the increasing popularity of the National Museum Pass (the 'Museumkaart'), of which 315,000 were sold in 2005 versus 900,000 in 2013.[3] The increasing number of museum visits is also related to the recent reopenings of several popular, large museums.

Film

After a period of growth from 2005 to 2011, the number of visits to cinemas and film theatres stabilised in 2013. The strong performance of Dutch films stands out: 1 in 5 cinema tickets was bought to visit the screening of a Dutch film. The video-on-demand market showed continued growth at the expense of the DVD market. ●

With thanks to Jeroen Boelhouwer

Literature

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Notes

1 This version of the Arts Index Netherlands differs in some respects from the previous one (see *Boekman* 97). In 2013 the Arts Index was presented as a work in progress. With this in mind, a few retrospective adjustments were made on the basis of advancing insight and in consultation with the group of researchers that had emerged around the index. This means that the figures now presented differ in some respects from the figures of two years back. The most important change was the addition of a new key indicator, Volunteering and household donations, and the division of data on employment in the creative industry into three subsectors. These adjustments were implemented retrospectively for the years 2005-2011 as well, so that it would be possible to have a picture of the Arts Index as from the first reference date. Furthermore, because the total amount in government grants for arts and culture is not available for 2013, it was decided that the figure from 2012 would be used for this purpose. These adjustmens show the importance of a continued debate on the figures and their meaning.

2 These figures are based on a survey, that asks whether respondents have regularly spent time practising different arts disciplines (e.g. singing, painting, sculpturing), in the past twelve months. The results show the estimated percentage of Dutch people that did regularly spend time on these amateur arts practices. Note that the survey does not define the term 'regularly'.

3 The 'creative industry' or cultural sector encompasses the Arts and cultural heritage, Media and entertainment and Creative business services.

Arts Index Netherlands 2005-2013

Capacity

Infrastructure		2005	2007	2009	2011	2013
1.1	Number of performances private sector	100	106	116	120	114
1.2	Number of performances (performing arts)	100	107	109	110	94
1.3	Theatre halls (performing arts)	100	106	104	107	104
1.4	Public library collections	100	96	91	87	77
1.5	Number of exhibitions in museums [1]	100	119	105	107	107
1.6	Number of new Dutch language book titles [1,2]		100	111	112	112
1.7	Number of new movies	100	90	103	106	109
1.8	Number of cinema screens	100	99	103	113	117
1.9	Number of cinema seats	100	97	105	110	113
Total		**100**	**102**	**105**	**108**	**105**

Companies/instutions		2005	2007	2009	2011	2013
1.10	Number of members VSCD (theatres)	100	109	103	103	100
1.11	Number of memers VNPF (music venues)	100	82	74	73	67
1.12	Number of members NGA (art galleries)	100	85	83	75	63
1.13	Number of public library organisations	100	59	50	48	47
1.14	Number of museums and BIS-presentation institutions	100	100	105	102	103
1.15	Number of listed/protected buildings [1]	100	102	102	103	104
1.16	Number of protected city/village areas	100	110	116	122	127
1.17	Number of sales points of registered bookstores [1]	100	101	104	104	100
1.18	Number of music stores	100	99	96	93	90
1.19	Number of media stores (CDs, DVDs, vinyl)	100	84	71	54	35
1.20	Number of film theatres	100	100	107	113	113
1.21	Number of cinemas	100	92	94	98	100
1.22	Number of centres for the arts	100	103	77	73	65
1.23	Number of companies in the creative industries	100	115	145	178	194
Total		**100**	**96**	**95**	**96**	**94**

Labour market		2005	2007	2009	2011	2013
1.24	Number of art-college graduates	100	100	110	118	114
1.25	Share of art-college graduates employed in own field, 1,5 years upon graduation [3]	100	100	98	99	98
1.26	Employment in arts and cultural heritage [4]	100	108	119	134	135
1.27	Employment in media and entertainment [4]	100	106	111	108	105
1.28	Employment in creative business services [4]	100	111	120	125	125
Total		**100**	**105**	**112**	**117**	**116**

Participation

Visits		2005	2007	2009	2011	2013
2.1	Number of visits performances private sector	100	102	90	80	71
2.2	Number of visits performing arts	100	105	106	104	96
2.3	Average reach canonical performing arts [5]	100	98	100	99	91
2.4	Average reach popular performing arts [5]	100	103	106	105	104
2.5	Use public library (loans + digital content)	100	98	85	97	86
2.6	Number of members of public libraries	100	99	100	99	96
2.7	Number of visits museums [1]	100	105	112	118	135
2.8	Number of visits cinemas	100	112	132	149	150
Total		**100**	**103**	**104**	**106**	**104**

Practise		2005	2007	2009	2011	2013
2.9	Number of pupils of arts centres	100	106	95	91	61
2.10	Member of music/drama/choral group	100	117	118	112	109
2.11	Spent time playing musical instrument		100	95	83	80
2.12	Spent time singing/choir/singing groups		100	93	86	83
2.13	Spent time on drama/musical/ballet		100	88	68	58
2.14	Spent time on crafts/painting/drawing/sculpturing		100	84	74	76
Total		**100**	**104**	**95**	**86**	**78**

Consumption		2005	2007	2009	2011	2013
2.15	Number of albums sold (physical and digital)	100	92	87	73	46
2.16	Number of ArtAcquisition (KunstKoop) contracts	100	93	71	55	41
2.17	Number of books sold (in 2011 and 2013 including e-books) [6]	100	102	104	98	86
2.18	Number of dvd's, blu-rays and games sold	100	117	107	93	56
Total		**100**	**101**	**92**	**80**	**57**

Volunteering and household donations [7]		2005	2007	2009	2011	2013
2.19	Volunteers in museums	100	113	133	174	182
2.20	Volunteers in the performing arts	100	112	125	169	159
2.21	Household donations [8]	100	91	100	88	157
Total		**100**	**105**	**119**	**144**	**166**

Financial flows[9]

Income (exculding government contributions)		2005	2007	2009	2011	2013
3.1	Turnover VSCD-theatres	100	119	116	108	106
3.2	Turnover VNPF music venues	100	94	108	107	97
3.3	Total spend under ArtAcquisition ('KunstKoop')	100	100	75	62	41
3.4	Turnover public libraries	100	94	101	98	90
3.5	Turnover museums and BIS-presentation institutions	100	115	129	147	187
3.6	Turnover book sales (for 2011 and 2013 including e-books) [10]	100	103	101	91	76
3.7	Turnover album sales (physical and digital)	100	83	71	57	48
3.8	Export value of Dutch music and art	100	202	235	266	217
3.9	Gross cinema box office takings	100	115	139	161	159
3.10	Copyright: music	100	108	126	107	106
3.11	Copyright: images	100	137	154	146	179
3.12	Copyright: text	100	121	103	75	65
3.13	Donations to culture by private funds, businesses and lotteries	100	118	134	81	65
Total		**100**	**108**	**112**	**101**	**93**

Government contributions		2005	2007	2009	2011	2013
3.14	Direct tax expenditures culture [1]	100	124	121	99	95
3.15	Indirect tax expenditure culture [1]	100	112	113	109	109
3.16	Government grants for arts and culture [11]	100	106	114	110	104
Total		**100**	**108**	**114**	**110**	**104**

Turnover creative industries		2005	2007	2009	2011	2013
3.17	Turnover creative industries	100	102	93	92	85
Total		**100**	**102**	**93**	**92**	**85**

Competitiveness

National competitiveness		2005	2007	2009	2011	2013
4.1	Share of art-college graduates relative to all college graduates	100	97	102	109	106
4.2	Share of export music in total exports	100	108	182	212	317
4.3	Share of export art objects in total exports	100	171	60	76	76
4.4	Share of Arts and cultural heritage in total employment [4]	100	102	111	124	128
4.5	Share of Media and entertainment in total employment [4]	100	100	103	99	99
4.6	Share of Creative business services in total employment [4]	100	106	112	116	118
4.7	Share of volunteering in cultural sector in all volunteering	100	125	175	175	153
4.8	Share of donations cultural sector in all donations	100	114	129	91	87
4.9	Share of (in)direct tax expenditure on culture in total tax expenditures	100	118	96	84	86
4.10	Share of government spending on culture in total expenditure [11]	100	96	94	94	91
Total		**100**	**114**	**116**	**118**	**126**

International competitiveness		2005	2007	2009	2011	2013
4.11	Average ranking of Dutch artists among global 1000 most exhibited artists	100	108	105	107	105
4.12	Share of Dutch galleries in top-level art fairs abroad	100	103	99	85	83
4.13	Share of new Dutch language book titles in total number of new book titles		100	101	73	75
4.14	Share of music albums and singles of Dutch artists in total albums and singles	100	124	115	113	128
4.15	Share of Dutch Buma/Stemra participants in all copyrights	100	105	102	104	100
4.16	Share of new Dutch films in total number of new films	100	60	92	116	134
4.17	Share of Dutch films in total box office takings	100	109	124	177	156
Total		**100**	**101**	**106**	**111**	**112**

Notes

1 Data are included in the Arts Index Netherlands when relevant, available at least every other year, reliable, comparable, and publicly available. Since the data sometimes no longer measure up to these standards when the arts index or our partners make adjustments, some indicators have been adapted for the years 2005-2013, namely 1.5, 1.6, 1.15, 1.17, 2.7, 3.14, 3.15 and 3.17.

2 The number of newly available book titles is measured based on the number of new ISBN-numbers, and therefore includes reprints of titles that were already published in previous years.

3 The share of art-college graduates that is employed (at least partly) in their own field, 1,5 years upon graduation, is based on a sample of graduates.

4 Where possible, data on the creative industry are presented per sub-sector.

5 The average reach of canonical and popular performing arts is not available for uneven years. These figures are there estimated, based on the figures of the previous and following years.

6 For 2005, there are no reliable and comparable figures available on the number of books sold (in 2011 and 2013 including e-books). Therefore, figures of 2006 are presented as the base value.

7 In 2015, we added the core indicator Volunteering and household donations to the pillar Participation

8 Household donations are based on a sample. These figures are estimated, whereby the estimation of 2013 is strongly influenced by an outlier in the underlying data. Therefore, one should interpret the figure of 2013 – especially in trend analyses – with caution.

9 For the pillar Financial Flows, all data are adjusted for inflation.

10 For 2005, there are no reliable and comparable figures available on the turnover of book sales (in 2011 and 2013 including e-books). Therefore, figures of 2006 are presented as the base value.

11 For 2013, figures on government contributions are not (yet) available. We therefore present the figure of 2012 instead.