Arts Index Netherlands 2005-2015

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The Arts Index Netherlands compiles 87 statistics about the arts and culture in the Netherlands. Together, these indicators provide an overview of the state of culture in the Netherlands since 2005. This 2017 update adds statistics for the year 2015 to the index, making it possible to answer an exciting question: has the Dutch cultural sector been able to recover from the difficult years between 2011 and 2013?

Arts Index Netherlands 2005-2015

The overall index number of the Arts Index Netherlands fell from 105 in 2011 to 104 in 2013, only to rise to 106 in 2015 – the highest level the index has reached to date. That *is* good news, but it is also only part of a bigger picture. Just as the temperature is not the only indicator of good or bad weather, the overall index number of the Arts Index alone does not determine whether the arts and culture is thriving. The temperature may be rising but the sky is still cloudy. Although it may be sunny in some sectors, others will need to hold on to their umbrellas a little bit longer.

For this reason, the Arts Index Netherlands has been supplemented with the Dutch-language publication *De Staat van Cultuur* ('The State of Culture'), in which developments are described, statistics put into context, and quantitative analyses accompanied by more qualitative ones. It

Cover image: Armin van Buuren at Ultra Miami, 2016. Photography: Bart Heemskerk serves, as it were, as the weather report for which the overall index number is just a summary.

The first edition of the Arts Index and *De Staat van Cultuur* was published in 2013. It covered the period between 2005 and 2011 and was updated in 2015 with data for 2013. In December 2017, the index was updated for the second time – extending coverage up to 2015 – and *De Staat van Cultuur 3* was published as a free, online publication.

In what follows, parts of *De Staat van Cultuur 3* have been translated and adapted for an international audience. First, the background and methods behind the Arts Index Netherlands are outlined, followed by a brief description of the political context in which some developments in the cultural sector must be seen. Then, the most important or notable results are elucidated.

The complete Arts Index Netherlands, including the underlying data, can be downloaded as an Excel sheet from cultuurindex.nl.

Background

The Arts Index Netherlands was first published in 2013 with the aim of bringing together as many publicly available, relevant and reliable long-term statistics about the arts and culture in the Netherlands as possible, and to make them accessible to everyone working or interested in the cultural sector. Four years on, this aim is widely supported in the sector. Insights into cultural developments and related policies are, after all, meaningful, and in some cases even essential, for example, when cultural policy is developed. The abundance of available data on the arts and culture also calls for them to be collected in a central location such as that offered by the Arts Index.

The Boekman Foundation is responsible for collecting and analysing data, as well as maintaining the index.[1] However, close collaboration with other parties in the cultural sector, including fellow cultural institutions and researchers, is indispensable. A solid and convincing examination of the value and valuation of the arts and culture would be unthinkable without a dialogue between researchers and the cultural sector – a dialogue that could strengthen both parties' understanding of the artistic and cultural world.

Methods

Most of the statistics in the Arts Index are gathered from publicly available sources, such as Statistics Netherlands (CBS), or the annual reports of cultural institutions. Some organisations have kindly provided additional data specifically for the index. A list of all data suppliers can be found at cultuurindex.nl.

The 87 indicators in the Arts Index Netherlands cover the odd years from 2005 to 2015, and are indexed with 2005 as the base year.[2] Indicators are averaged in 'core indicators', such as Consumption or Labour Market. Core indicators are then grouped in four pillars: Capacity, Participation, Financial Flows and Competitiveness, each of which has an index number based on the average index number of underlying core indicators. The mean of these index numbers constitutes the overall Arts Index. In calculating average index numbers, each of the underlying pillars, core indicators or indicators carries equal weight.

When using index numbers, it is important to ensure that the base year is not an extraordinary year. In 2005, there was no economic downturn, nor were there any significant changes in cultural policy. A process of digitization had already started, and was continued. 2005 was an average year, which makes it very suitable as a base year for the Arts Index.

Political context

This new update adds statistics for 2015 to the Arts Index Netherlands. The period between 2013 and 2015 is interesting to examine, as 2013 marks the end of a rather turbulent period in the cultural sector. The first cabinet under prime minister Rutte took office in 2010. Halbe Zijlstra was State Secretary for Education, Culture and Science. A year later, Zijlstra published his vision on cultural policy in *Meer dan kwaliteit: een nieuwe visie op cultuurbeleid* ('More than quality: a new vision on cultural policy'), in which he stated that a shift in cultural policies was needed. In his view, the government acted too much as a financier with too little attention for entrepreneurship and audiences (Zijlstra 2011, 2). This resulted in considerable cuts in government subsidies for culture.

Zijlstra's views and policy led to a polarising debate, which mainly focussed on cutting back

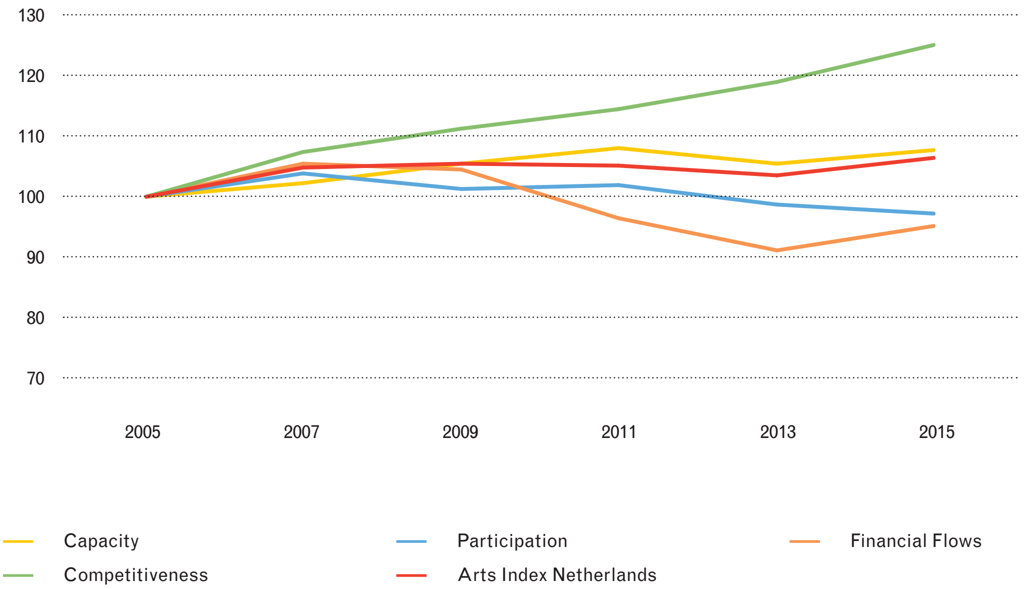

Figure 1 – Arts Index Netherlands 2017

government subsidies, the effect it would have on the cultural sector and whether it was justified. The new update of the Arts Index adds a factual background to this debate, as it now covers both Zijlstra's time as State Secretary and the period thereafter. It is, however, important to note that although the Arts Index provides insight into the effect of Zijlstra's policies on the cultural sector, it cannot and should not be seen as an evaluation of his policies.

Results

As mentioned earlier, the overall index number of the Arts Index Netherlands rose from 104 in 2013 to 106 in 2015. Underlying pillars, however, show different developments in the past ten years, as is illustrated in Figure 1.

In this mostly quantitative chapter, the most important results are described for each of the four pillars Capacity, Participation, Financial Flows and Competitiveness. The next chapter provides a summary of the most important developments in the cultural subsectors Performing Arts, Visual Arts, Literature, Heritage and Film.

Capacity

Statistics in the core indicator Labour Market provide a somewhat ambiguous perspective on the cultural labour market. For example: although the number of art college graduates has grown between 2005 and 2015, this number will fall in the near future due to the declining number of new enrolments.

Also ambiguous are the indicators that describe the number of jobs in the cultural sector. At first glance, these numbers appear to have grown exponentially since 2005: in the subsectors arts and cultural heritage and creative business services alone by 41 and 31 per cent respectively.

This may look like a positive development, but on closer inspection, the cultural labour market has broken up rather than grown. The number of companies in the creative industries has grown much faster than the number of jobs, while the total turnover in the sector has decreased. This indicates that most of the new jobs in the cultural sector are freelance or part time jobs. Omitting freelancers in labour market indicators would show a 13 per cent decrease in the number of jobs between 2010 and 2016 (Statistics Netherlands 2017). These developments result in a labour market that is increasingly characterized by flexibility and uncertainty (Commissie arbeidsmarktverkenning cultuursector 2016).

Although the increase in the number of freelancers helped the number of companies in the creative industries grow by 112 per cent between 2005 and 2015, the average index number of the core indicator Companies/institutions fell by 4 points in the same period and 2 points between 2013 and 2015. The core indicator Infrastructure, on the other hand, recently rose by 5 points. This suggests that the growth in Financial Flows since 2013 (see below) has benefitted infrastructure rather than companies or the cultural labour market.

Participation

There are many different ways to participate in the arts and culture. The statistics that make up the pillar Participation describe four of them through its core indicators. One way is active participation in artistic leisure activities, for example, playing a musical instrument, singing, drama, painting or drawing. As is the case for many 'traditional' hobbies, the increase in popular digital pastimes has led to a decrease in time spent on creative pastimes, although a stabilization can be observed since 2011. In 2013, 2015 and 2017, about 41 per cent of Dutch people (aged 6+) pursued a creative pastime (Neele et al. 2017).

Although on average less time is invested in active participation in artistic leisure activities, more time is invested in cultural volunteering. Museums saw an increase in volunteering of 10 per cent between 2013 and 2015,[3] while 28 per cent more volunteers worked in the performing arts in the same period.

Another way to participate in the arts and culture, is to visit performances and exhibitions. The core indicator Visits shows modest growth, mainly in the number of visits to museums, cinemas and performing arts performances. In an increasingly online world, these institutions, like festivals, offer the possibility to visit a distinctive 'offline' place or to let visitors feel part of something bigger – values that could explain part of their growing popularity.

The rise in visits, and subsequently in money spent on these visits, is in line with domestic expenditures, which rose in 2015 for the first time in years (Statistics Netherlands 2016). However, less money is spent each year on the purchase of cultural goods. The average index number of the core indicator Consumption was 48 in 2015: half of what it was ten years earlier. However, a drawback of this core indicator is that the underlying indicators mainly involve 'traditional' ways of *acquiring* cultural goods – both in physical (CDs, vinyl, DVDs, Blu-Rays, books) and digital form (digital music albums or e-books). This does not take into account 'newer' and increasingly successful ways of *accessing* cultural goods, such as streaming films and music and 'all-you-can-read' subscriptions for e-books into account. It is important to examine the extent to which these new ways of accessing cultural goods are replacing the physical purchase of cultural goods, and whether cultural consumption is indeed declining or rather taking on new forms.

Financial Flows[4]

While Financial Flows generally developed positively between 2013 and 2015, underlying indicators moved in different directions. Income from royalties decreased for writers, painters and photographers, for example, but a larger sum of royalties was divided among musicians.[5]

Some indicators in the pillar Financial Flows have seen a strong growth since 2013. Gross cinema box office revenues increased by 9 per cent. Dutch Electronic Dance Music and DJs boosted the export value of Dutch music by 14 per cent. The turnover of museums was no less than 37 per cent higher in 2015 than it was in 2013.

The same goes for donations to culture by private funds, businesses and lotteries, which rose until 2009 but dropped sharply in the next four years. 2013 marked a turning point, and in 2015 donations were almost at the same level as in 2005.

The index number of the core indicator Income (excluding government expenditures on the arts and culture) rose from 97 in 2013 to 107 in 2015. This could be seen as a positive development, not least because government subsidies decreased between 2005 and 2015. Direct tax expenditures (for example, tax benefits for monument maintenance or gifts to culture) and government expenditures on the arts and culture fell by 16 and 7 per cent respectively. Indirect tax expenditures (such as the lower VAT on cultural goods) amounted to 721.1 million euros in 2015, compared with 720 million euros in 2005. On average, tax expenditures and other government expenditures on the arts and culture fell by 6 per cent between 2005 and 2015.[6]

Competitiveness

Compared with other sectors the cultural sector is stronger in 2015 than it was in 2005. Almost all indicators on this subject, grouped in the core indicator National Competitiveness, improved on average by 35 per cent. The biggest contributor to this growth is the share of music export in total export, which increased by an impressive 271 per cent.

Another indicator that showed a positive development in recent years is the share of donations to the cultural sector in all donations to charities. This share fell between 2009 and 2013, but since then, the popularity of culture as a possible recipient of donations has increased by 14 per cent.

In the pillar Competitiveness, the core indicator National Competitiveness is complemented by International Competitiveness, which shows a small but stable growth. The share of Dutch movies and especially Dutch music in the total number of new movies and new albums and singles grew, while Dutch galleries were less present at international top-level art fairs.

Key developments per sector

The most important developments in the Performing Arts, Visual Arts, Literature, Heritage and Film between 2005 and 2015 are summarized in this chapter. These summaries are based on the five analysis chapters in *De Staat van Cultuur 3*. Please refer to this publication for the full text of these chapters (in Dutch), as well as for literature lists.

Performing Arts

- After years of continued decrease, the turnover of the Dutch music industry finally grew again in 2015, mainly due to the success of streaming services such as Spotify. But the interest in digital music platforms was not the only thing that peaked: vinyl is on the rise too.
- 2015 brought more good news for the Dutch music industry: as a result of the international success of Dutch dance music, the export value of Dutch music kept rising and ended up 378 per cent higher than it was in 2005.
- Festivals are an increasingly popular way of consuming culture in the performing arts. In 2016, 639 music festivals and 152 theatre festivals attracted 16.9 and 4.4 million visitors respectively. Put into context: in the same year, music venues affiliated with the VNPF (Association of Dutch Pop Music Venues and Festivals) drew 4.8 million visitors, while 10 million visitors attended performances in theatre and concert halls affiliated with the VSCD (Association of Directors of Theatres and Concert Halls).
- After four years of decline, the number of visitors to performing arts performances increased in 2015. However, the commercial, non-subsidised sector shows a less positive development: attendance has fallen by 42 per cent between 2005 and 2015, even though the number of performances has increased by 26 per cent.
- The number of people that spend leisure time on the performing arts has decreased since 2007, but another way of spending time at the performing arts has seen a significant increase: the number of volunteers in the sector has almost doubled in the same period.

Visual Arts

- Visual artists have a very vulnerable position in the cultural labour market. Compared with other art professionals, they not only earn less, but also have to have another job outside of their field more often.
- Artists had fewer possibilities to exhibit or sell their work in 2015 than they had in 2005: the number of galleries has decreased, as has their total turnover. Budgets that companies reserve to acquire new works of art have also plunged. These decreasing budgets potentially influence the development of the careers of young artists. Research has shown that early acknowledgments of quality by parties with a financial commitment have a stronger influence on later prices of the artworks than those by parties without a financial commitment.
- Data suggest that there has been an increase in international activities of galleries and visual artists, although the international ranking of Dutch artists among the 1000 most exhibited

artists and the attendance of Dutch galleries at international high-end art fairs has dropped somewhat.

Literature

- Research about reading habits shows that the share of people that read books in their free time has dropped significantly in the past decade. This is reflected in both the declining number of loans from libraries and sales of books, although sales have recovered somewhat since 2014.
- Although 18 per cent fewer books (not including study or scientific books) were sold in 2015 compared with 2005, the supply of new Dutch book titles has remained more or less constant.
- The share of e-books in loans and sales increased by impressive figures in the last years, although this number is still relatively small compared with the distribution of physical books.
- As the number of people that use the library to borrow books decreases, libraries are increasingly taking on more social tasks. This has led to a rapid growth in the number of events organised by libraries. A similar development is reported for bookshops.

Heritage

- Museums keep welcoming more visitors each year: they attracted 31.4 million visitors in 2015, compared with 19.6 million in 2005. International visitors make up an increasing share of the total number of visitors.
- The growth in the number of visitors between 2005 and 2015 (60 per cent) has been larger than the growth in the number of exhibitions (1 per cent) in the same period. This is partly due to the increasing importance of blockbuster exhibitions: large exhibitions that are intensively marketed and almost become events themselves.
- As organisations in the heritage sector strengthen collaborations, an increasingly coherent view of the sector emerges.
- The amount of hours worked by volunteers in museums has doubled between 2005 and 2015.
- The number of listed or protected buildings, monuments and city or village areas has stabilised in recent years.

Film

- The number of cinemas and art houses increased between 2005 and 2015. As a result, their combined capacity grew as well: in 2015 there were 25 per cent more screens and 31 per cent more seats compared with a decade earlier.
- Cinemas and art houses are able to screen an increasing number of new films: 371 in 2015, compared with 324 in 2005. Of the 371 new films in 2015, 61 were entirely or partially Dutch productions. This share of 16 per cent is higher than it was in 2005, although it can fluctuate wildly from year to year.
- In line with the growing capacity, the number of visitors increased by 60 per cent between 2005 and 2015. A rise in the total turnover of cinemas (when adjusted for inflation) of 73 per cent in the same period is largely a direct result of the growing audience.
- The number of DVDs and Blu-rays sold each year fell by 68 per cent between 2005 and 2015. This could be seen as a result of the emergence and increasing use of video-on-demand services such as Netflix. The Netherlands Film Fund estimated that the revenue of these services grew from 24 million euros in 2010 to 172 million euros in 2015.

Conclusion

The Arts Index Netherlands offers a multifaceted perspective on the arts and culture in the Netherlands, with both positive and worrisome developments. Cuts in government subsidies heralded hard times and losses for the cultural sector, and even though the demand for cultural entrepreneurship also led to more financial independence, it remains unclear at what cost. Although the situation has improved somewhat in 2015, the cultural labour market and the increasing number of volunteers remain a concern.

A cautious conclusion might be, however, that the cultural sector has found the way up again. The Boekman Foundation will continue to monitor the cultural sector over the next two years together with various experts and other stakeholders to see whether this positive trend continues and the clouds have, indeed, lifted.

Literature

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Notes

1 The Boekman Foundation collects and disseminates knowledge and information about the arts and culture in both policy and practice and initiated the Arts Index Netherlands in collaboration with the Netherlands Institute for Social Research (SCP). It stimulates research and the development of opinion on the production, distribution and consumption of the arts and on national and international policy on arts and culture.

2 For some indicators, data are only available from 2007 onwards, therefore 2007 is the base year for these indicators. The index number of these indicators for 2007 (by definition 100) does not contribute to the average index number for the core indicator.

3 Some caution is required with this percentage as museums sometimes find it difficult to report how many hours volunteers have worked. So, although the number of volunteers in museums has increased between 2013 and 2015, their exact share in hours worked is not absolutely certain.

4 All indicators in this pillar are adjusted for cumulative inflation, based on the consumer price index of Statistics Netherlands (see Statistics Netherlands 2018).

5 This was partly due to a more efficient procedure in which royalties to musicians could be paid faster.

6 For this edition of the Arts Index, we retroactively adjusted the way government subsidies are measured. Index numbers about government subsidies can therefore differ from those in previous editions of the Arts Index.