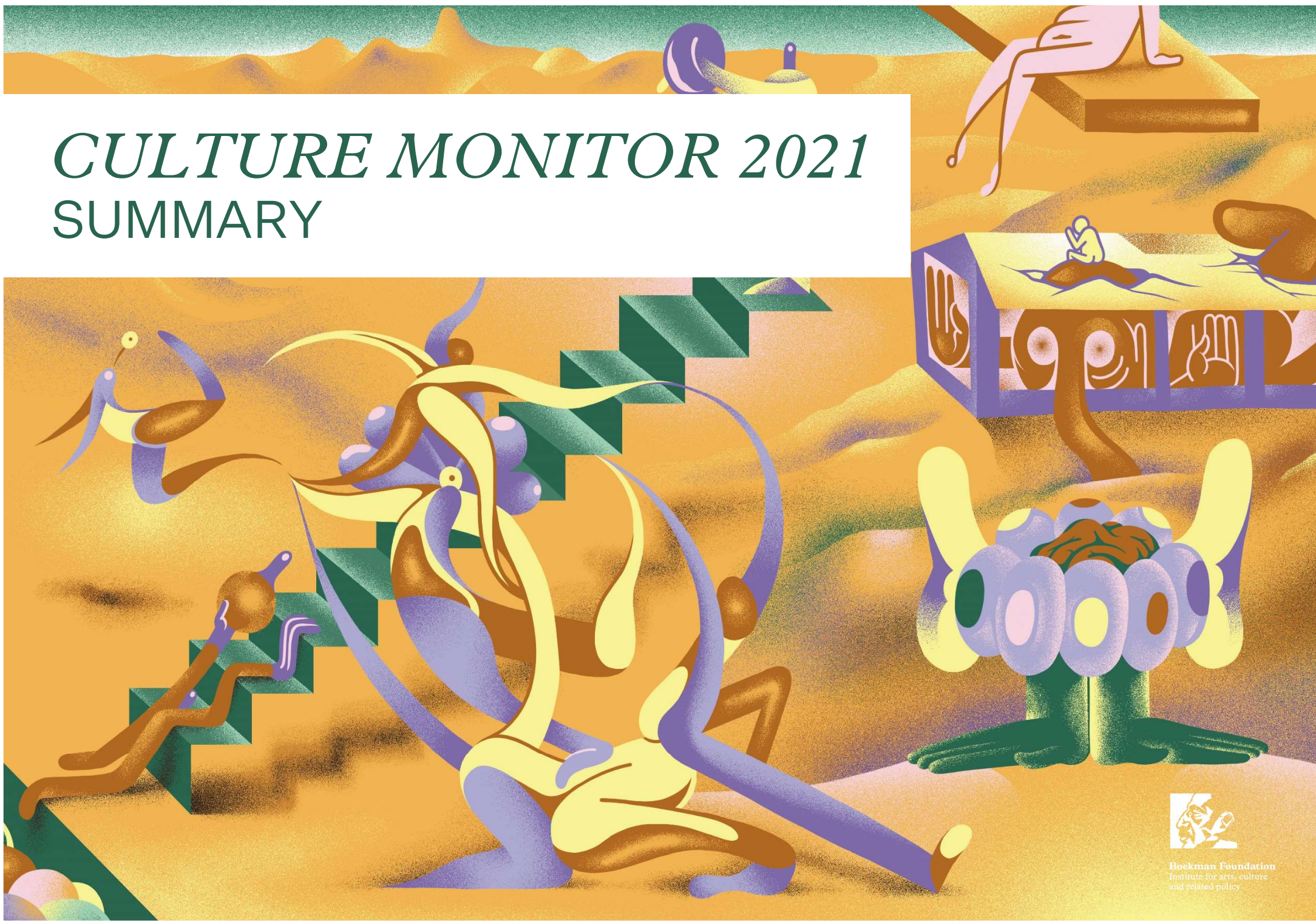


CULTURE MONITOR 2021

SUMMARY



CULTURE MONITOR 2021

SUMMARY

Rogier Brom
Thomas van Gaalen
Maartje Goedhart
Maxime van Haeren
Jan Jaap Knol
Janna Michael
Shomara Roosblad
Bjorn Schrijen
Sabine Zwart



Boekman Foundation
Institute for arts, culture
and related policy

The Culture Monitor is an instrument created by and for use by the Dutch cultural sector. The monitor collates data and qualitative insights on developments in cultural life, thus seeking to contribute towards a strong cultural sector in the Netherlands. The Culture Monitor Annual Report 2021 reviews trends and developments in the cultural sector in 2020 and 2021. In addition to an introduction and an overarching chapter, the report consists of nine domain chapters and four thematic chapters. Domain chapters provide key figures and show important trends and developments for each cultural discipline or sector. Thematic chapters describe policy themes and topics that are important for the entire cultural field.

Photo by Lisa Maatjens



SUMMARY

OVERARCHING CHAPTER

CULTURE IN 2021: FIVE TRENDS

This chapter discusses five salient developments in the Dutch cultural sector, bringing together themes of broad significance for the field. Since March 2020, the ongoing coronavirus pandemic has had an unprecedented influence on society and consequently on cultural life. The cultural sector faced heavy losses in income and audience reach, and shifts are occurring within cultural supply and consumption. Aside from losses, however, new opportunities arise - particularly in the digital domain. In addition to its direct effects, the pandemic has also brought more long-term developments within the cultural sector to light. These not only include economic issues such as the precarity of the cultural and creative labour market, but also diversity and inclusion, cultural participation, digitisation and the increased social engagement of artists and makers.

DOMAIN ANALYSES

AUDIOVISUAL

The coronavirus pandemic caused disruptions and shifts in the audio-visual sector. Cinema sales dropped due to mandatory closures. Major foreign films were postponed, which actually increased the market share of Dutch film. This postponement might lead to an enormously packed movie-release schedule when the postponed films are released eventually. The same is true for production: the catch-up that is now being made for postponed productions is leading to scarcity in the labour market.

Streaming services have benefited from the lockdowns, seeing even faster revenue growth than in previous years. This growth has several implications for the industry, including discussion about reinvesting revenue into the sector and a high demand for new stories and talented screenwriters..

THE VISUAL ARTS

Even before the onset of corona crisis, the position of visual artists was already particularly precarious. And although many

institutions have been clamouring for recently established employment standards since the crisis, high inequality persists within the sector. The pay gap between visual artists is large, female makers are underrepresented in exhibitions and collections, and despite increased attention for diversity, museum and institution boards remain mostly white, highly educated and male.

The number of visits to art museums and institutions remains low after two years of corona crisis, putting some institutions at risk of irreparable financial damage. Still, there are silver linings, too: diversity and inclusion are being pushed harder than ever, art buyers remain loyal, and digitisation has, in part, provided a solution for museums, makers, and galleries since the corona crisis began.

CULTURAL HERITAGE

Within the field of cultural heritage, there is an emphasis on community. The shift from an expert-driven determination of what constitutes heritage to the relevance of the heritage community – in which everyone participates in cultural heritage – is central to several developments. Examples are the Faro Convention, the sense of urgency, and growth of initiatives around the

SUMMARY

representation of multiple voices, diversity and inclusion, and the increasing interest in intangible heritage.

Due to the ongoing corona pandemic and the measures taken by the government, much of the heritage engagement took place online in 2021. As a result, institutions gained the ability to reach new audiences, but digitisation also presented challenges for the sustainable preservation of cultural heritage. The latter calls for more digital partnerships between institutions, both nationally and internationally.

GAMES

The game industry is growing at impressive rates every year. The number of game creators is growing rapidly, as are the number of players and sales. The corona crisis has generally reinforced this trend. In addition to economic value, the cultural recognition of games is also rising. Increasingly, this results in crossovers with other cultural domains.

Nevertheless, the industry also faces challenges. Dutch creators, for instance, have less access to subsidy opportunities than their colleagues in other countries. Additional efforts are needed to preserve (Dutch) games as cultural heritage. The increasing number of new games makes it more difficult to stand

out with a new game. The game industry has a long way to go with its own diversity, although a positive development is that an increasing number of individuals and organisations are taking steps into this direction.

LITERATURE

The corona crisis created ‘a year of winners and losers’ in the book market. People were reading more, which resulted in a growing market and major profits for online sellers. At the same time, the corona crisis negatively impacted physical bookshops, writers and the reading skills of schoolchildren. The corona crisis also worked to the disadvantage of the previously launched Reading Offensive, a collective effort to promote reading for which there is an increasing need due to the rapid decline in reading skills and enjoyment of reading among the Dutch population.

The need to make the literary field more diverse and inclusive is growing, with various ambitions, initiatives and research projects as a result. Renewal in the field is also reflected in various forms of innovation, which include new methods for metadata, book recommendations, digital literature, and spoken word.

ARCHITECTURE

Architects and spatial designers have an integral role to play in transitions such as climate adaptation and are increasingly seen as experts on societal issues. Consequently, this also changes the role of the architect within the profession. Another change within the profession is the significant growth in the number of self-employed persons, due to the reduced scale and fragmentation in the labour market. This makes the position of the (independent) architect vulnerable. Larger firms are better able to withstand financial risks, which means they can participate in public tenders more often.

When looking at gender relations in the Dutch architecture sector, women are usually in the minority. Nevertheless, we see an increasing number of women in architecture-related educational programmes, and initiatives to make the sector more inclusive are also on the rise.

DESIGN

Like architecture, design is used to address, solve or investigate pressing societal issues. The so-called discipline of social design exemplifies this. This phenomenon is certainly not new, but it gathers increasing

SUMMARY

social support and awareness and is simultaneously supporting a growing interest in inclusive design. The field of work for designers is broadening, and crossovers between design and other sectors are occurring more frequently.

In addition, sustainability is prevalent in the design sector: designers are increasingly experimenting with new, organic materials and are joining in the worldwide pursuit of recycling and circularity. The versatility and boundlessness of design make it an exceptionally dynamic field.

THE PERFORMING ARTS

Performing arts in the Culture Monitor currently consist of two sub-domains: Music and Theatre.

Music

Like the other performing arts sectors, the music sector, has been hit hard by the corona pandemic because live performances are an important form of expression and source of income. The digitisation of performances is therefore an important response from the sector, and digital performances can reach large audiences. At the same time, digital

performances usually do not (yet) work as a revenue model.

Currently, limited data is available on diversity and inclusion in the Dutch music sector. However, there are indications of exclusion mechanisms based on ethnicity. Available research also shows that female musicians, on average, generate less income with music and tend to be more involved in educational activities than their male colleagues. A movement towards a more inclusive music sector is visible. The sector is also working towards more sustainability. For instance, musicians and organisations – especially now during the corona crisis – question their travel behaviour, and festivals and music venues are working on more sustainable energy sources, buildings and catering.

Theatre

The corona crisis exposed several bottlenecks in the performing arts system, as well as in cultural funding. Theatre producers without structural subsidy saw the greatest shrinkage in their own income. The vulnerable position of self-employed persons in the performing arts sector was painfully exposed. The intended trickle-down effect of the

supporting subsidy measures did not materialise. In other sub-sectors, total turnover shrank less sharply due to the stabilising effect of long-term subsidies and the corona related aid initiated by the government.

There were also promising developments in the theatre sector. Theatres experimented with new possibilities for online presentations in order to be able to still reach audiences. In addition to this, several initiatives were created to strengthen diversity and inclusion in the sector.

SUMMARY

THEMATIC ANALYSES

PROFESSIONAL PRACTICE AND THE CULTURAL LABOUR MARKET

The cultural labour market in the Netherlands has grown over the past decade. However, a distinction should be drawn between the number of jobs for employees and the number of self-employed persons, with the latter growing faster. It is difficult to determine how much work has actually been added with the growth in the number of people employed in the sector. Differences can be seen between the subsectors and the occupational groups within them. In this chapter, we examine the volume of employment, characteristics of professional practice, the influence that corona has had on both of these, and the degree of accessibility of the cultural labour market. Finally, the steps taken to implement change in a focused manner are outlined.

CULTURE AND PARTICIPATION

An inescapable conclusion of the analysis is that cultural participation is unequally distributed across the population. Educational career, income and migration background continue to have an effect on

cultural participation. Pre-existing differences between social groups may even have increased during the corona crisis. But how permanent are the effects of the corona crisis on participation in cultural life?

The recovery of the cultural sector may take some time given the continuing uncertainty due to the ongoing corona crisis. It is not a foregone conclusion that the 'old' audience will find its way back. There is plenty of attention for the cultural infrastructure, but it is just as important to think about the recovery of cultural participation. Because although people did not remain idle during the crisis – they read more, played more games, streamed more and video-on-demand flourished – substantial efforts will be necessary to make culture 'by and for everyone' possible.

SUSTAINABILITY

The figures leave no room for doubt: the earth is warming up, with major consequences for the quality of life in the world. It is therefore necessary to increase sustainability, and the cultural sector can play an important role in this. Not only can the sector reduce its own ecological footprint, but it can also encourage others to do so and

contribute towards creative solutions for the climate crisis.

Research shows a strong motivation for this within the sector, but also that bottlenecks such as the lack of money, time and knowledge can make it difficult to translate ambitions into action. Here lies a possible role for the government. At the moment, an increasing number of municipalities are working (together) to make the cultural sector more sustainable, but there is a lack of attention to sustainability in national cultural policy.

DIVERSITY AND INCLUSION

Together, diversity and inclusion are a core theme of the Culture Monitor in the coming years. In the monitor and at the Boekman Foundation as a whole, we are committed to critically addressing diversity and inclusion. In doing so, we highlight the societal debate and importance of diversity and inclusion. In this chapter, we bring together already existing research on diversity and inclusion.

COLOPHON

Authors: Rogier Brom, Thomas van Gaalen, Maartje Goedhart, Maxime van Haeren, Jan Jaap Knol, Janna Michael, Shomara Roosblad, Bjorn Schrijen, Sabine Zwart

Cover illustration: Munir de Vries

About the Boekman Foundation

www.boekman.nl (Dutch) or www.boekman.nl/en/ (English)

The Boekman Foundation is the Dutch Institute for arts, culture and related policy. It collects and disseminates knowledge and information about the arts and culture in both policy and practice. It stimulates research and the development of opinion on the production, distribution and take-up of the arts and on national and international policy on the arts and culture.



Boekman Foundation
Institute for arts, culture
and related policy

BOEKMAN FOUNDATION
Institute for arts,
culture and related policy

Herengracht 415
1017 BP Amsterdam
The Netherlands
www.boekman.nl



Boekman Foundation
Institute for arts, culture
and related policy