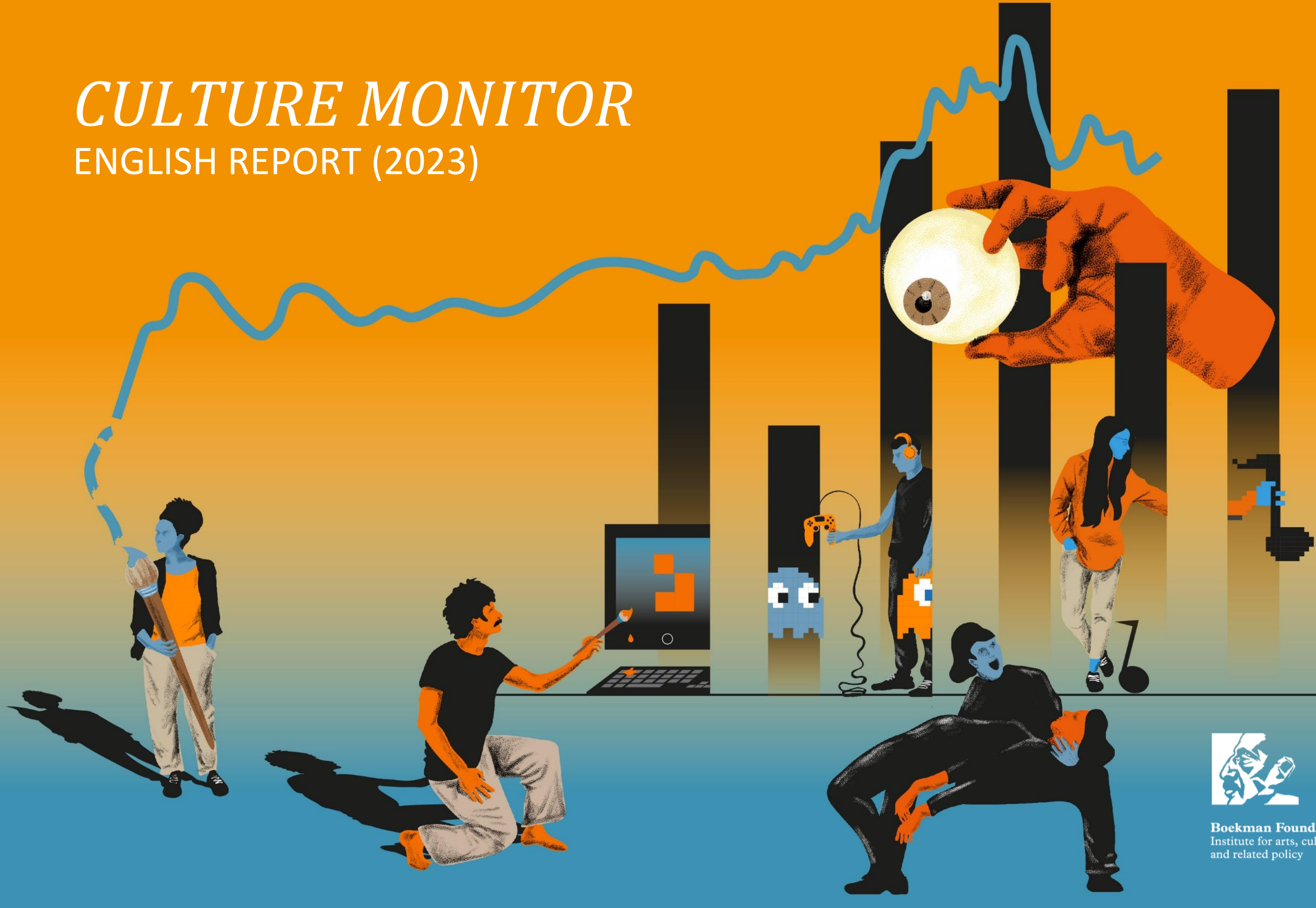
CULTURE MONITOR

ENGLISH REPORT (2023)



Boekman Foundation
Institute for arts, culture
and related policy

CULTURE MONITOR
ENGLISH REPORT (2023)

This publication consists of the English translations of all domain and theme chapters as published in February 2023 on the Culture Monitor website.
The most up to date versions of these texts and visualizations are available (in Dutch) on www.cultuurmonitor.nl.
Please note: Figures may contain legends in Dutch and links and sources may be in the Dutch language only.

Illustration cover page: Fadi Nadrous

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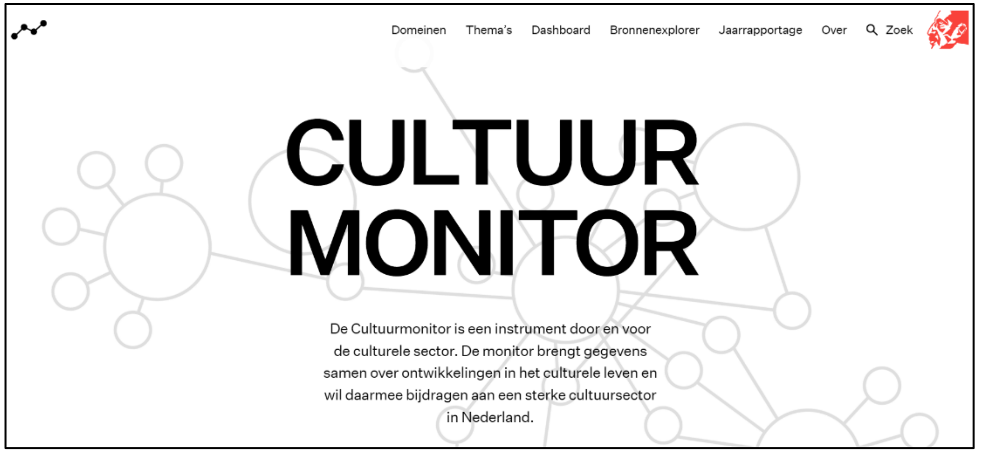
The Culture Monitor is a tool for and by the cultural sector. The Monitor collects and analyses data on cultural life in the Netherlands. It reports on long-term trends and puts current developments on the agenda.

ABOUT

The Culture Monitor gathers data on developments in cultural life in the Netherlands and makes it accessible in various ways. Textual analyses report on long-term trends and put current developments on the agenda. In addition, an interactive Dashboard provides access to a database with a large number of indicators on the Dutch cultural sector.

The Culture Monitor is aimed at everyone interested in cultural life in the Netherlands and developments in the cultural sector. Policy-makers, administrators, researchers, journalists, cultural practitioners and other interested parties can use this website to learn about and interpret broader trends in the cultural sector. The aim of the Monitor is to provide adequate information for policy and practice, thus contributing to a strong cultural sector. The Monitor therefore responds to the needs of the sector and policy makers to bring together existing and new information, data and knowledge on long-term trends, and current issues.

The Culture Monitor builds on and links as much as possible with previous monitoring instruments such as *Cultuur in beeld* [*Culture in Focus*] (Ministry of Education, Culture and Science, until 2017), *Het culturele leven* [*Cultural Life*] (SCP, 2018) and the *Cultuurindex* [*Culture Index]* and *De Staat van Cultuur* [*The State of Culture*] (Boekman Foundation, 2013-2019).



Culture Monitor home page

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HOW DOES THE CULTURE MONITOR WORK?

The Culture Monitor provides information on the Dutch cultural and creative sector. However, because culture is not a clearly defined concept, we have deliberately opted for a broad and fluid concept of culture. We start with culture 'in the broadest sense': subsidized and unsubsidized, outdoor and indoor, canonical and popular, professional and amateur, individual and collective. As circumstances change, new forms and genres may be added to the Culture Monitor.

The information in the Culture Monitor is presented in a number of ways, which are explained below.

DOMAIN PAGES

Domains within the Culture Monitor can be likened to cultural 'disciplines' or 'subsectors'. The Culture Monitor currently contains information about the Architecture, Audio-Visual, Visual Arts, Architecture & Design, Heritage, Games, Literature, Design, Performing Arts, Music and Theatre domains. This selection is largely taken from the publication *Het culturele leven* [*Cultural Life*] from the Netherlands Institute for Social Research. New domains or further breakdowns will be added in the future.

Information on each domain is presented in a fixed order on the domain pages. The pages successively present a selection of key figures for the domain, describe the main developments and identify the gaps in knowledge.
>>> read more

THEME PAGES

The theme pages of the Culture Monitor deal with topical and important issues that are relevant to not just one cultural domain, but to the cultural sector as a whole. Theme pages put developments into perspective and make it possible to discover cross-connections between domains.

Unlike domain pages, theme pages are more open-ended. Depending on the theme, the pages may take the form of a data story, an analysis, or a review of the literature. In the future, new themes will be continuously added to the Culture Monitor and existing theme pages will be updated.
>>> read more

DASHBOARD

Underpinning the Culture Monitor is a database containing a large number of indicators that capture aspects of cultural life over a multi-year period. We take a flexible approach to the indicators in the database. We do not impose limitations on the overall set of indicators, but we do impose limitations on individual indicators. In all cases, they must be collected on multi-year and sustained basis, be reliable and traceable, and provide relevant and cross-cutting insights. This allows us to add indicators if there is a case for doing so.

Indicators can be selected from the dashboard by filtering by domain, theme, location and time period. The selected indicators are then automatically visualized in the best possible way. Depending on the data selected, different visualizations are possible. At the top right of the window, you can select other views or download the selected data.
>>> visit the online Dashboard

HOW DO WE PRODUCE THE CULTURE MONITOR?

As far as possible, we base our research for the monitor on existing sources, publications, and datasets. Some of these sources cover the whole cultural sector, such as the *Monitor Creatieve Industrie [Creative Industry Monitor]* (Media Perspectives) or the *Satellietrekening Cultuur & Media* [Culture & Media Satellite Report] (CBS). In addition, the Culture Monitor brings together key data and insights from relevant thematic, sectoral, and regional reports at an aggregated level in one central location. Examples of sources from which data is collected include leisure research (CBS, Vrijetijdsomnibus [Leisure Omnibus]), the *Monitor Amateurkunst [Amateur Art Monitor*] (LKCA), the *Games Monitor* (Dutch Game Garden and NEO Observatory), the *Erfgoedmonitor [Heritage Monitor*] (RCE) and the DutchCulture database.

To monitor culture in a sustained and complete manner, therefore, we are dependent on available data sets and research results from other organizations. We are happy to discuss the inclusion of existing and new data, the prioritization of questions and indicators, and the coordination of new research projects. In this way, together with partners from the (policy) field, we can create a central place for cultural data and contribute to a strong sector and well-informed cultural policies.

The Boekman Foundation's researchers continuously gather data and insights on the various domains and themes. They do this together and in consultation with stakeholders and experts from the sector, who feed the Monitor with indispensable and in-depth knowledge and information. When we add new data, we make a distinction between the data in the Dashboard and the textual analyses in the domain and theme pages. We will continue to update the dashboard with new figures as they become available. In 2022, our main focus was on the theme pages of the Culture Monitor. We wrote completely new analyses for the existing themes and added the new Culture in the Regions and Digital Transformation theme pages. The domain pages also received regular minor updates, updating text and adding new data. The English version of the online Culture Monitor is forthcoming in 2024.

Each year, the main findings and data will be summarized in an annual publication and presented at a public event.

>>> jump to Colophon to read who produces the Culture Monitor

DOMAINS

The domain pages provide key figures and show the important trends and developments per cultural domain.

What are domains?
In the context of the Culture Monitor, domains can be compared to cultural 'disciplines' or 'subsectors'. The Culture Monitor currently contains information on the domains of Architecture, Audio-Visual, Visual Arts, Design, Heritage, Games, Literature, Music, Performing Arts and Theatre. New domains or further breakdowns will be added in the future.

The different domain pages have a fixed layout. The pages successively offer a selection of key figures about the domain, describe the most important developments, and identify the knowledge gaps that still exist. This information is based on recent data, available literature and discussions with many stakeholders and experts.

Detail cover *Culture Monitor Year Report* 2022 / Illustration: Fadi Nadrous

OVERVIEW

Design & Architecture

The Design & Architecture domain page focuses on overarching figures. Data on the various design professions and annual turnover in the design sector are examined.

Architecture

The Architecture domain page mainly contains figures about the labour market and discusses developments such as the changing role of the architect in these transitional times and the fragmentation of the profession.

Design

The Design domain page deals with the labour market, the problem-solving capacity of designers and trends such as inclusive design. Other themes dealt with here are social design and sustainability.

Theatre

On the Theatre domain page, we consider the position of workers in the sector and the number of performances and visits. Attention is also paid to inclusion, digitization and financing.

Literature

The Literature domain page contains figures and information about the creators and readers of books, excluding academic and educational publications, as well as about the organizations such as publishers, bookshops and libraries that form the links between them.

Design

The Design domain page deals with the labour market, the problem-solving capacity of designers and trends such as inclusive design. Other themes dealt with here are social design and sustainability.

Games

On the Games domain page, we discuss developments in the production, distribution and consumption of digital games, as well as the surrounding infrastructure. Because the games industry is inherently international, both Dutch and international data and insights are included.

Music

On the Music domain page, we provide figures about income, performances and visits. We also discuss the consequences of the pandemic, the income position of musicians and the diversity of the music sector.

Performing Arts

The Performing Arts domain page provides figures on the number of performances and visits by discipline and the number of people employed in the performing arts.

Theatre

On the Theatre domain page, we consider the position of workers in the sector and the number of performances and visits. Attention is also paid to inclusion, digitization and financing.

Music

On the Music domain page, we provide figures about income, performances and visits. We also discuss the consequences of the coronavirus pandemic, the income position of musicians and the diversity of the music sector.

Heritage

The Heritage domain page provides figures on the supply of movable and immovable heritage and considers issues surrounding the cultural significance of heritage and who determines what heritage is.

DOMAINS

Visual Arts

The Visual Arts domain page discusses developments surrounding the (labour) market position of visual artists and the associated challenges. In addition, museums, art consumption and digitization are also examined.

Audio-Visual

On the Audio-Visual domain page, you'll find information about the distribution and consumption of, in particular, feature films in cinemas and via streaming services. Audio-visual production is also examined.

Architecture

The Architecture domain page mainly contains figures about the labour market. It also discusses developments such as the changing role of the architect and the fragmentation of the profession in these transitional times.

DOMAIN: THEATRE

On the Theatre domain page, we examine the position of workers in the sector and the number of performances and visits. Attention is also paid to inclusion, digitization and financing. This domain is based on the 'theatrical performing arts', which also include dance, opera, cabaret and contemporary music theatre, for example. Together with the Music domain, theatre falls under the broader performing arts sector, see also the Performing Arts section.

Written by Maxime van Haeren
Latest update 17 January 2023

De Toverberg, performance by ITA / Photography: Dim Balsem (courtesy of ITA)

THEATRE

SUMMARY

The coronavirus crisis has revealed several sticking points in the performing arts and cultural funding system. Independent producers saw the largest contraction in their income and turnover. The vulnerable position of the self-employed in the performing arts sector was painfully exposed. The intended trickle-down effect of the support measures does not seem to have happened. In other subsectors, total turnover contracted less sharply due to the stabilizing effect of multi-year subsidies and the pandemic support received.

Yet not everything turned out to be negative. Theatres experimented with new possibilities for online presentations in order to still be able to reach audiences. And several supporting initiatives were created to embed diversity and inclusion in the sector. But by the end of 2022, venues were facing a new threat: the explosive increase in costs due to inflation and the energy crisis.

1. INTRODUCTION AND KEY FIGURES

Theatre is a multifaceted domain within the performing arts. This domain is also referred to as ‘the theatrical performing arts’, since dance, opera, contemporary music theatre and cabaret, for example, often do not identify themselves by the term ‘theatre’ alone. Discussions within the field and research for this analysis show that it is difficult to find consensus on the demarcation of this domain. This is not only due to the number of disciplines, but also depends on how differently the work practices are organized per discipline. In addition, interdisciplinary collaboration and separation between disciplines make it difficult to make a clear demarcation. For the analysis of the theatre domain, the Culture Monitor assumes a field that encompasses all these the theatrical performing arts.

In the Culture Monitor, we use the performing arts domain in the database to collect various indicators. This is because much of the available data on the performing arts cannot (yet) be broken down into disciplines such as music or theatre. In the domain analyses, a breakdown is made according to music and theatre, so that more depth can be given to the individual developments in these domains.

Professional performing arts

This visualization contains data on (1) the number of visits to professional performing arts by discipline, (2) the number of professional performing arts performances by discipline, and (3) volunteers in the performing arts (including trainees).

For (1) and (2), the data does not include music, which is treated as a separate domain in the Culture Monitor.

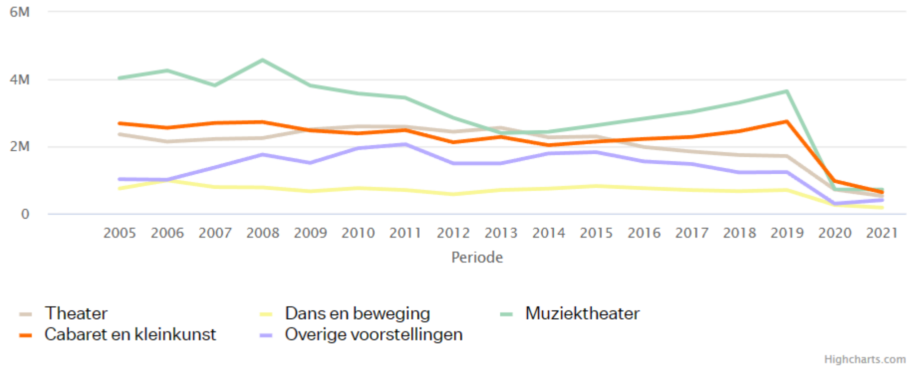

Figure 1. **Visits to professional performing arts, 2005-2021**
[Theatre; Dance and movement; Musical theatre; Cabaret and contemporary music theatre; Other] Source: CBS

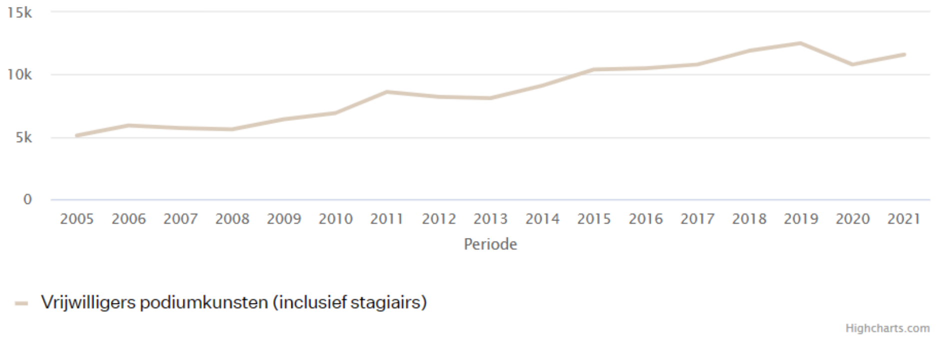

Figure 3. **Volunteers and interns in professional performing arts, 2005-2021**
Source: CBS

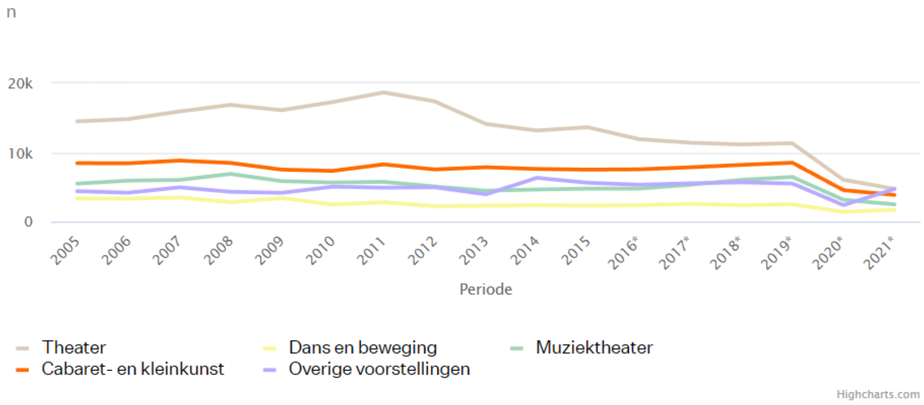

Figure 2. **Performances of professional performing arts, 2005-2021**
[Theatre; Dance and movement; Musical theatre; Cabaret and contemporary music theatre; Other] Source: CBS

2. TRENDS AND DEVELOPMENTS

Coronavirus pandemic

The theatre sector is largely dependent on audience revenues and has therefore been hit hard by the coronavirus pandemic as a whole. Many theatre performances were cancelled from the start of the first lockdown during the pandemic. The figures below provide insight into the number of cancelled premieres in the 2019-2020 theatre season, compared to the number of premières played in the previous season (Berg 2019). In 2020-2021, there were about 700 announced premieres, of which around 170 were cancelled (Weerd 2021). The actual number of cancelled productions is probably much higher.[1] Many performances were put on hold, to be revived (again) when the theatres opened.

Impact of the pandemic on performances

The data visualized on the right provides insight into the number of cancelled premières in the 2019-2020 theatre season compared to the number of premières played in the previous season.

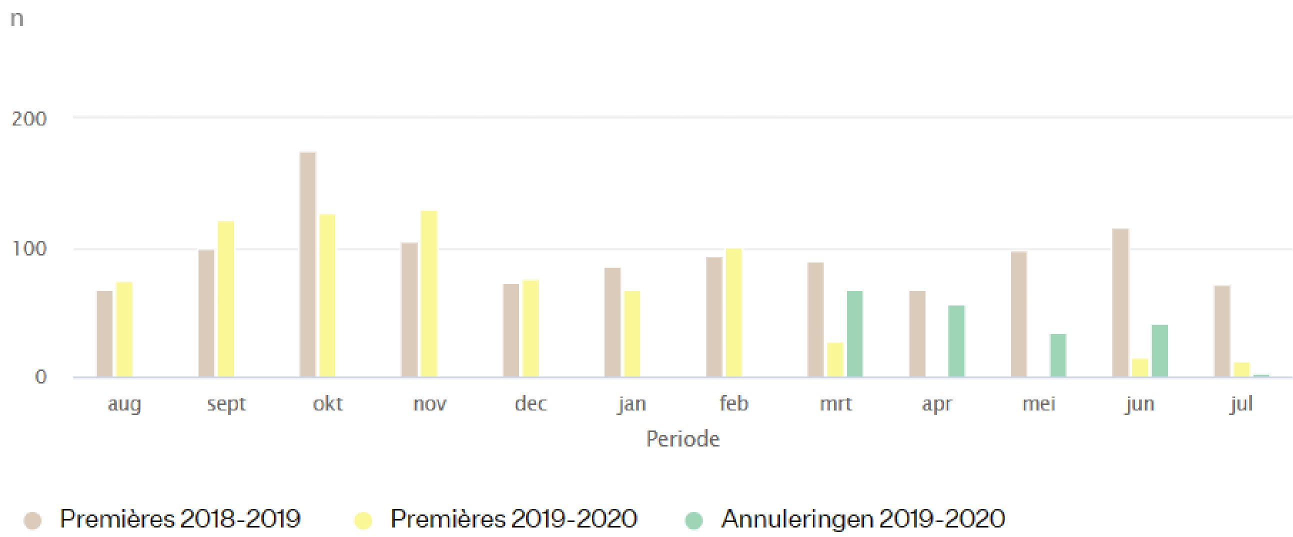

Figure 4. **Number of performances premiered or cancelled due to the pandemic, 2018-2020**

[Premieres 2018-2019; Premieres 2019-2020; Cancellations 2019-2020]
Source: Theaterjaarboek [*Theatre Yearbook*] 2019/2020

[1] After all, many performances are cancelled before premieres are publicly announced (Weerd 2021), and early ideas are shelved for later.

Even after the reopening of the theatres in the spring of 2022, the return of the public proved problematic. Members of the theatre association VSCD reported that visitors only returned in dribs and drabs at the end of April 2022, that they still did not see massive numbers of visitors by September of that year, and that presales for the 2022-2023 season were far below pre-pandemic levels (Wensink 2022). The Nationaal Theaterfonds [National Theatre Fund] investigated exactly why the public was hesitant, and showed that this was mainly due to the lack of clarity as to whether concerts and performances would actually take place (Beerda 2022). Health risks often play a role for the elderly, and costs are an obstacle to visits for young people (Ibid.).

In September, the National Theatre Fund, in collaboration with the VSCD (Theatre and Concert Hall Directors Association), the NAPK (Performing Arts Association), and the VVTP (Independent Theatre Producers Association), launched the sector-wide performing arts campaign Zin om je te zien [*Want to see you*]. With commercials on radio, television and social media, the initiative, financed by the Ministry of Education, Culture and Science (OCW), aimed to re-enthuse the public for visiting the theatre. The VSCD's *Podia 2021* publication also makes it clear that these are uncertain times for theatres. Not only do the prospects regarding coronavirus remain uncertain – especially because coronavirus support is uncertain were restrictions re-imposed – but, even apart from the pandemic, these are challenging times for venues thanks to the tight labour market, inflation and rising energy costs (VSCD 2022a, VSCD 2022b). The same publication also shows that, due to the coronavirus crisis, three out of four primary school children, who normally regularly visit theatres, had to miss the out in 2021 (VSCD 2022a, VSCD 2022c).

It was expected that an important part of the programming in the 2021-2022 theatre season would consist of performances that had been postponed from the 2020-2021 season (Lubberding 2019). But theatres also had to contend with the restrictive measures as a result of coronavirus during this season. At the end of 2021, theatres and other cultural institutions had to close their doors again. This was a hard blow, because December is normally a busy month, and many productions could not take place due to these measures (VSCD 2021). 2022 started in lockdown, theatres gradually reopened from the end of January and there were no more restrictions in mid-March (VSCD 2022a). In January 2023, positive sounds were heard: theatre seats were increasingly well filled, mainly with new or young audiences. The old visitors were finding their way back to the auditoriums more slowly (Halouchi 2023, Bos 2023).

The VSCD figures on the next pages show how venue capacity, the number of performances and the number of visits decreased in 2021 compared to 2019, the last 'normal' year before the pandemic. Despite the restrictions, the venues still performed remarkably well: on average, venues had 28 per cent of their capacity available, but within that capacity they offered 10,346 performances, which is 40 per cent of the total number of performances in 2019. There were 1.9 million visits, which is 22 per cent of the number in 2019. Good use was therefore made of the limited capacity of 28 per cent, concluded the VSCD, although this required a relatively large number of implementations (VSCD 2022a).

Daling zaalcapaciteit, uitvoeringen en bezoek VSCD-podia, 2019-2021

	2021	2019	Daling
Zaalcapaciteit alle zalen	257	908	-72%
Uitvoeringen	10.346	25.862	-60%
Bezoeken	1.865.431	8.452.765	-78%

Figure 5. **Fall in theatre capacity, number of performances and number of visits 2019-2021**

[Theatre capacity all stages;
Performances;
Visits]
Source: *Podia 2021*, VSCD (2022)

The following figures from the report *Ongelijk getroffen, ongelijk gesteund* [*Unequally affected, unequally supported*] (Goudriaan et al. 2021)[2] show the impact of the coronavirus crisis on the finances of the various theatrical performing arts sectors in 2020, compared to the same period in 2019. The independent producers (members of the VVTP)[3] are almost entirely dependent on audience revenues for their turnover and therefore saw the greatest decline in their own income and turnover. The fact that the total turnover in the other subsectors, after pandemic support, shrinks less sharply than personal income is due to both the stabilizing effect of multi-year subsidies and the coronavirus support received (Goudriaan et al. 2021, 6). Within personnel costs, average[4] cuts of 55 per cent were made in self-employed staff, compared to 3 per cent in salaried staff. Independent producers even reduced their self-employed staffing costs by 97 per cent, while in 2019 they still relied 60 per cent on their efforts (Ibid.).

[2] The Boekman Foundation is currently working on a follow-up study to this report. The results will be included in the Culture Monitor as soon as the report is published.
[3] This concerns only 13 of the 30 VVTP members with usable responses in this study.
[4] The average percentages mentioned also concern the subsectors of music, music venues and exhibiting institutions and media labs not mentioned here, which were also examined in the study *Ongelijk getroffen, ongelijk gesteund* [*Unequally affected, unequally supported*].

Financial impact of the pandemic

The visualizations below contains data on (1) the financial impact of coronavirus on theatre and (2) the results of coronavirus support for theatre.

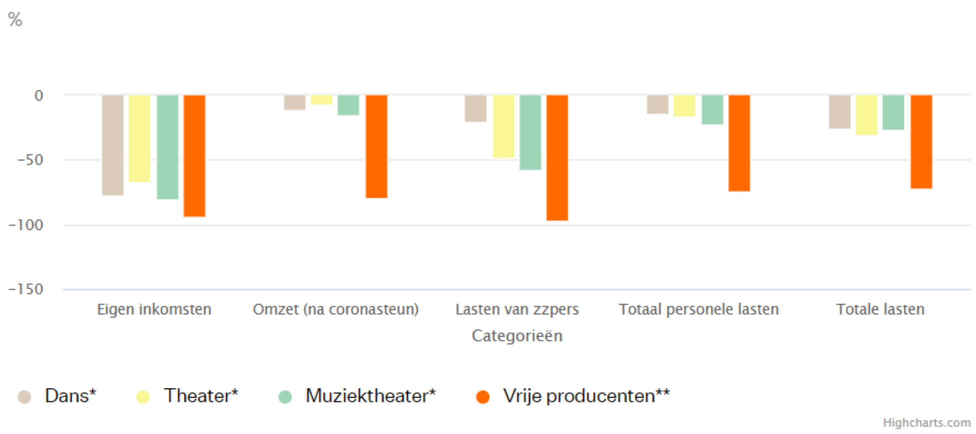

Figure 1. **Developments in theatre sector income and costs in the last three quarters of 2020, compared to 2019**
[Own income; Turnover (post-coronavirus support); Freelance costs; Total personnel costs; Total costs] Categories: [Dance*; Theatre*; Musical theatre*; Independent producers**]

Source: *Ongelijk getroffen, ongelijk gesteund* [*Unequally affected, unequally supported*]
* This concerns organizations from these subsectors that receive a multi-year subsidy from the Ministry of Education, Culture and Science (OCW), or the culture funds of the national government.
** These figures refer to 13 of the 30 VVTP members who provided useful responses to the survey.

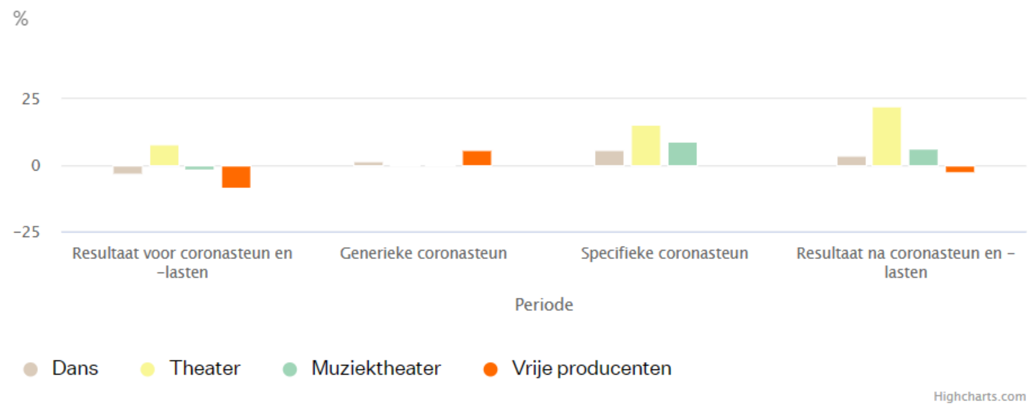

Figure 2. **Theatre sector results from ordinary business operations in the last three quarters of 2020, before and after coronavirus support**
[Result for coronavirus support and costs; Generic coronavirus support; Specific coronavirus support; Result after coronavirus support and cost] Categories: [Dance; Theatre; Musical theatre; Independent producers]

Source: *Ongelijk getroffen, ongelijk gesteund* [*Unequally affected, unequally supported*]

Ongelijk getroffen, ongelijk gesteund [*Unequally affected, unequally supported*] thus exposes the vulnerable position of freelancers in the performing arts sector. While the support measures also intended to have a trickle-down effect (institutions receive support and pass it on to their self-employed employees), this study shows that a lot of cutbacks have been made on the self-employed. At the same time, research[5] conducted among its own members by NAPK, the Dutch performing arts association, shows that 84 per cent have indeed followed the guidelines for trickle down in 2020. However, this concerns only long-term subsidized institutions (Luttels 2021). The Tozo [Temporary Bridging Scheme for Self-Employed Entrepreneurs] should have compensated for the decrease or lack of income of self-employed people (Goudriaan et al. 2021). However, due to the partner test,[6] many self-employed entrepreneurs were not eligible for this scheme. After 1 October 2021, it was no longer possible to apply for Tozo at all. Instead, self-employed persons were required to apply for social assistance benefits for the self-employed (Bbz).

The coronavirus crisis has also revealed various weak spots in the system of performing arts and cultural funding. Cultural journalist Robbert van Heuven and dramaturge Remco van Rijn explain that this ‘systemic crisis’ consists of a large number of factors that are strongly interrelated, but are hardly seen or discussed in conjunction (Heuven et al. 2020). “The unequal assignment, relationship and appreciation between the large and the small theatre, between the BIS and the FPK, between subsidized and commercial; the growing army of self-employed people and employees on a zero-hours contract (…) who carry the sector, but who have hardly any protection; sector umbrella organizations that can’t get a handle on their own supporters; and a ministry without political clout” (Ibid.). According to them, the coronavirus crisis made the complexity of the sector more transparent than ever – an image that is confirmed in various conversations with the sector that were held for this domain page.

In November 2021, the Council for Culture already warned of the consequences of the ongoing uncertainty in the cultural sector: “The council is concerned about the mental ‘metal fatigue’ that has occurred among many workers in the sector, including those who work or are a contractor at one of the BIS institutions. The long period of shifting, cancelling, starting over and rethinking, just like the ongoing uncertainty, takes its toll” (Council for Culture 2021, 14). An example of this toll was given by the International Theatre Amsterdam (ITA), when it announced in November 2022 that it would have to cancel a number of performances in 2023 due to a shortage of technical staff in the theatre (Santen 2022).

Digital transformation

As a result of the coronavirus crisis, theatres have started experimenting with new possibilities for online and digital presentations in order to still be able to reach an audience. This digital transformation is not new,[7] but the pandemic gave it a strong boost. After 18 months of experimenting with online and digital possibilities during the crisis,

[5] For this analysis, the annual accounts and management reports of 77 NAPK members were used, of which 26 were BIS institutions and 51 were institutions subsidized for several years by the Performing Arts Fund NL.
[6] The partner test looks at the partner’s income to determine the amount of the benefit. When the household income exceeds the social minimum, no claim can be made for the Tozo.
[7] For example, since 1996, DEN Knowledge Institute for Culture and Digital Transformation has been committed to supporting the sector in digitization, and the publication *Digital Theatre: A Casebook* (Wiley et al. 2018) shows that even before coronavirus, research was being conducted into the extent to which a digital strategy can strengthen theatres in their position in society.

theatres and companies are considering the mix of live performances and digital presentations. The production database of the performing arts collection of the Allard Pierson Museum documents 146 online performances in the 2020-2021 season, more than two-thirds of which were performed as a live stream (Weerd 2021). It has become apparent that a larger audience can be reached online.[8] However, the question is whether the online revenue model is profitable, according to discussions with the sector. This question is often answered with scepticism: in the long term, visitors will still prefer a live experience to an online one. Nevertheless, online programming has now become a permanent part of the organizational strategy at a number of cultural institutions (Knol 2021), although by the end of 2022 the attention of theatres and theatre companies was again mainly on physical programming. For example, online programming could also be seen as a driving force behind broadening the audience reach, reports Wouter van Ransbeek (at the time creative director of the International Theatre Amsterdam) in an interview: it is accessible and motivating for a physical visit (Ibid.). According to the culture council, a well-thought-out strategy is needed "to combine digital and live activities in organizations in a fruitful way" (Council for Culture 2021, 6).

Interdisciplinary collaboration and funds

There is increasing cooperation within the sector in terms of content and organization. Many co-productions are realized, sub-disciplines merge into each other, and new sub-disciplines are created. Previously, co-productions and interdisciplinary collaborations were made more difficult because, within the subsidy systems of the national cultural funds and governments, subsidies had to be applied for within a certain discipline (Brom et al. 2019). This would actually have created a preference for private funds (Haeren 2019, Brom et al. 2019). The Performing Arts Fund NL indicates that it is decompartmentalizing (Fonds Podiumkunsten 2020). In addition, the field has observed that the emphasis for private funds is on the social importance[9] of an art project, which can also make it more difficult for some interdisciplinary applicants to receive a subsidy. In short, the development of increasing co-production and interdisciplinary collaboration (or decompartmentalisation) in the sector is on the radar of funds, but is still not fully supported by the funding system.

Diversity, equity and inclusion

Diversity and inclusion form a common thread through the 2021-2024 policy period, where endorsement of the Diversity and Inclusion Code (CDI) is a requirement for grants (Engelshoven 2019). The theatre sector must work on the representation of society as a whole, including minorities who are currently still under-represented. Various supporting initiatives were already launched in 2019, such as The Next incentive prize for diversity and inclusion, and the Theater Inclusief incentive programme (Beeckmans 2019; Theater Inclusief 2019). In 2020, The Need For Legacy foundation[10] was added, a platform and community for a more diverse and inclusive theatre world (Beeckmans 2020).
In 2020, the Black Lives Matter movement provided further incentives for the theatre

[8] See, for example, the article 'Op zoek naar een nieuwe tussenvorm' ['In search of a new intermediate form'] by Sander Janssens (2021a).
[9] For example, the VSB Fund states: "As an applicant, you must be able to clearly demonstrate what you want to bring about for the participants or the public. And we think it is important that the project provides a direct connection or meeting between art and people" (VSB Fonds 2021).
[10] On 5 November 2021, The Need for Legacy won the &Awards project prize of €20,000 for creating visibility for diverse theatre history. The jury calls this community project "necessary and indispensable" (Code DI 2021).

sector to put the lack of diversity and inclusion on the agenda: in June, more than 600 art professionals endorsed the open letter 'Wij zien jullie, witte kunst- en cultuursector' ['We see you, white art and culture sector']. While the CDI looks at the four Ps of programme, personnel, public and promotion, this letter instead focuses on institutional racism and calls for those in positions of power to make room for people with a (culturally) diverse background.

In its advice to Minister Van Engelshoven on the allocation of subsidies in the period 2021-2024, the Council for Culture writes in response to the applications submitted by institutions: "As far as the diversity and inclusion code is concerned, there is still a long way to go (…) The reflection on, and handling of, the code is rarely complete and in-depth" (Council for Culture 2020). Art sectors other than theatre are criticized in particular, while a number of successful practical examples from the theatre sector are mentioned, including Club Guy & Roni, Het Nationale Theater, HNTjong, HipHopHuis, Likeminds, Toneelgroep Oostpool and Tweetakt (Ibid). Nevertheless, in the theatre sector there is still a great deal to be done for diversity, inclusion and equality – as the Onderzoek Theater Inclusief [Inclusive Theatre Study] of 2022 also shows (Haeren et al. 2022).

In addition, there are various (critical) questions in the field: how can diversity and inclusion best be measured?[11] Is it possible to think more in terms of a tailored approach, since diversity and inclusion manifest differently in urban areas than in provincial areas with smaller local governments? How can we ensure that diversity and inclusion become sustainable, and do not slip into tokenism?[12] And how can we look beyond the diversity and inclusion code to the accessibility of the theatre sector as a whole at institutional level: how much room is there really for makers?

Abuse of power and a safe workplace

In recent years, various reports of transgressive behaviour have come out in the cultural sector, particularly in arts education and the performing arts (Leden 2021). At theatre schools, tackling transgressive behaviour and ensuring a safe learning environment has become urgent since a series of reports in response to #MeToo, according to an interview with theatre school directors Caspar Nieuwenhuis (HKU Theater) and Rob Ligthert (Toneelacademie Maastricht) (Heerikhuizen 2021). They tackle this problem by means of participation councils and evaluation moments in which students participate (also referred to as 'quality assurance') and a code of conduct that all lecturers must comply with (Ibid.).

In 2019, the reporting centre Mores.online was founded on the initiative of the NAPK, which more than 30 industry associations, organizations and other cultural professionals have since joined. In the autumn of 2021, the NAPK also published the policy framework 'Veilig de vloer op' ['Safe on the floor'] for the prevention of undesirable behaviour in the performing arts sector; NAPK created this together with members from the trade association and a sounding board group of cultural partners, including Platform ACCT art vocational education platform, the

[11] See, for example, how Statistics Netherlands introduced a new classification of the population by origin in 2022, gradually abandoning the former distinction between 'Western' and 'non-Western' (CBS 2022).
[12] Tokenism involves only a superficial, token, or perfunctory effort to be inclusive of people from minority groups. This is done, for example, by recruiting staff from under-represented groups to avoid criticism and create the appearance of treating people equally within the organization (Sherrer 2018).

Kunstenbond and Platform Aanvang! (NAPS 2021a). The policy framework offers institutions and performing-arts producers tools to prevent undesirable forms of behaviour and for formulating their own policy on this (NAPK 2021b).

Subsequently, the social safety foundation for the performing arts, Stichting Sociale Veiligheid Podiumkunsten, was established by the NAPK in the spring of 2022. This foundation supports members of the NAPK in developing and implementing policy in the field of social safety (NAPK 2022).

In June 2022, the Council for Culture issued its report, Over de grens: op weg naar een gedeelde cultuur [Over the border: towards a shared culture]. The aim of this report, commissioned by former Minister Van Engelshoven of Education, Culture and Science (OCW), was to gain a better understanding of what is going on in the cultural sector concerning transgressive behaviour and its prevention and detection. In this report, the council notes that transgressive behaviour takes many different forms (for example bullying, racism, intimidation and discrimination in addition to sexual harassment). It addresses the problematic position of gatekeepers in the cultural sector as well as the lack of inclusion in the sector, the culture of silence when it comes to transgressive behaviour, the risks in art education, and a lack of structures aimed at social safety (Council for Culture 2022).

Fair practice

In 2017, the Fair Practice Code was launched – a code of conduct for doing business and working in art, culture and the creative industry based on five core values: solidarity, diversity, trust, sustainability and transparency (Fair Practice Code 2021a). The code was created after the Social and Economic Council and the Council for Culture signalled erosion and a worrying labour market (Fair Practice Code 2021b). Since the coronavirus crisis, fair practice and the principle of fair pay have come under further pressure.

As mentioned earlier, self-employed people in particular are were hard hit by the pandemic. The 300 million euro emergency support that was initially earmarked for culture by former Minister Van Engelshoven mainly went to institutions with multi-year subsidies, and the desired ‘trickle down’ effect was insufficient (Goudriaan et al. 2021). Even before the coronavirus crisis, the sector felt little concern for independent theatre makers. For example, since 2019, the Creatieve Coalitie [Creative Coalition] has been committed to a decent share of revenues for makers, see their appeal to parliament here.[13] Since 2019 too, Platform Aanvang! has been committed to more continuous and sector-wide conversations, ranging in scope from (independent) lighting designers to directors of BIS theatre companies (i.e., theatre companies with structural subsidies). In addition to the lack of support for self-employed professionals in theatre, a lack of transparency about subsidy allocations has also been observed (Groen 2020). For example, for some makers the grounds on which their subsidy is rejected are not made sufficiently clear (Ibid.), while transparency and trust are two of the five core values of the Fair Practice Code (Fair Practice Code 2021c).

[13] On November 30, 2021, they sent a letter to parliament containing various calls and proposals to support workers in the creative and cultural sector. Specific support for institutions in the cultural sector does not trickle down enough in the chain and therefore does not reach self-employed people and flex workers.

Inflation and the energy crisis

The pandemic (and its aftermath) is no longer the only crisis that society and therefore theatres must face: the current inflation and energy crisis (partly the result of the war in Ukraine) threaten to plunge many venues into financial hardship – as the VSCD announced in September 2022 (VSCD 2022d, see also Janssens 2022). At that time, only 7 per cent of VSCD venues received some form of compensation to cover rising energy costs (Ibid.). In addition to energy costs, many venues face a rent increase (increased by the CPI index of 9.7 per cent as of 1 July), inflation is also affecting wage costs and the minimum wage has been increased by 10 per cent. The indexation of subsidies is lagging behind and therefore cannot compensate for the rising costs. Passing on these costs to the public through ticket price increases is not seen as an option by most venues: it jeopardizes accessibility (Ibid.). These high costs can also make it difficult to comply with Fair Pay or to invest in digitization, for example.

In October 2022, the cultural and creative sector partner organisation Taskforce sent a letter to the cabinet with an urgent appeal to support the cultural sector generally regarding the consequences of these crises (Kunsten ’92 2022). That same month, various venues reported concrete figures about the consequences. For example, Chassé Theater announced that it would have to close in January 2023 without extra support in order to avoid bankruptcy: the costs for gas and lighting for this venue having risen from 250,000 euros to 1,000,000 euros on an annual basis (Schapendonk 2022). 52 per cent of the venues that are members of the VSCD saw their energy contract expire on 1 January 2023 – meaning an explosive rise in costs (VSCD 2022e). For the Stadsschouwburg Nijmegen and Concertgebouw de Vereeniging, that means at least 500,000 euros in additional costs, for TivoliVredenburg in Utrecht an increase from 400,000 euros to 1,500,000 euros. “Compensation is badly needed,” says Jeroen Bartelse, director of TivoliVredenburg. “We cannot absorb such a huge blow alone” (Ibid., see also NOS 2022).

In November 2022, the government complied with the Taskforce’s letter in the Autumn Memorandum 2022. In it, it pledged structural extra resources to compensate public and social facilities for high costs. This involves 300 million euros for the period 2023-2025 and that amount is expected to rise to 400 million euros for 2026 and 2027 (Rijksoverheid 2022). This means that many theatres and other cultural organizations can breathe a sigh of relief: at least the Chassé Theater could announce that imminent bankruptcy is now out of the picture (Musters 2023).

3. WHAT ELSE WOULD WE LIKE TO KNOW ABOUT THE THEATRE DOMAIN?

Impact of the pandemic

The figures from *Ongelijk getroffen, ongelijk gesteund* [*Unevenly affected, unequally supported]* provide some insight into the consequences of the pandemic for the theatre sector. However, many questions still remain, according to research and discussions in the field. For example, there is concern about the long-term effects of the coronavirus crisis. What will politicians do? How are self-employed people going to hold their own, following the failure of trickle-down and the disappearance of the Tozo compensation scheme, and how does that differ per region? How does the outflow of the sector look – have lots of people really changed jobs, or will they return once the theatre sector picks up again? There was already pressure on visitor numbers before the pandemic, but is the situation like since coronavirus? Will the public return? And what consequences does this pressure on visitor numbers have for programming? For example, is programming more secure? What will remain of all the online initiatives, and to what extent will the theatre sector become more hybrid online-offline?

Public research and data on impact

There are still many questions about audiences in the theatre sector, especially with a view to reaching diverse and inclusive regional audiences in the context of the CDI. This is why it is necessary to bring together more audience research and figures from different venues, makers and companies. Moreover, data must be consistent and comparable. The sector has set up the DIP – Digitaal Informatieplatform Podiumkunsten [Digital Information Platform for the Performing Arts] – for this purpose. Together with Cineville, CJP, Kunsten '92, Platform Acct and Rotterdam Festivals, DIP forms the Taskforce Samenwerkingsverband Publieksdata [Public Data Collaboration Task Force]. Under the leadership of DEN Knowledge Institute for Culture & Digital Transformation, research is underway into how to increase knowledge and expertise about public data in the culture sector.

What the theatre sector would also like to know is its impact on society. In the Culture and Participation section, we further discuss the reach of and participation in culture, including the performing arts. We investigate the effects of digitization and crises (including the pandemic and energy crisis as well as inflation) on participation, as well as who is most affected by them. We will continue to collect information on this in the coming years.

4. WOULD YOU LIKE TO KNOW MORE ABOUTE THE THEATRE DOMAIN?

View more data about the theatre domain in the Culture Monitor Dashboard.

More literature on the theatre domain can also be found in the knowledge base of the Boekman Foundation.

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6. DISCUSSION PARTNERS

In 2021 we spoke to the following people while information gathering to develop this domain page:

- Simon van den Berg (editor-in-chief Theatermaker/Theaterkrant.nl)
- Iris Daalder (senior policy officer social positioning, NAPK)
- Lucia van Heteren (chairman of Theaterkrant.nl/Stichting BPN, lecturer in Theatre studies at the University of Groningen)
- Jenny Mijnhijmer (theatre secretary, Performing Arts Fund NL)
- Siart Smit (director Oerol Festival, participant United Performing Arts Festivals)
- Mirjam Terpstra (director, NAPK)
- Marianne van de Velde (senior policy advisor, Performing Arts Fund NL)
- Representatives of Platform Aanvang!
- Ron Visser (dance and music Theatre secretary, Performing Arts Fund NL)

LITERATURE

The literature domain page contains statistics and information about the creators and readers of books, (excluding academic and educational publications), as well as the organizations that form the links between them, such as publishers, bookshops and libraries. We also pay attention to forms of literature beyond the printed book, such as e-books, audio books, apps and performance art.

Written by Bjorn Schrijen
Latest update 30 January 2023

Library Broederenkerk in Zutphen / Photography: Lisa Maatjens

SUMMARY

The coronavirus pandemic resulted especially in 2020 in ‘a year of winners and losers’ in literature. Although people read more, the market grew and web shops benefited, there were negative consequences for bookshops, authors and children’s reading skills, for example. The coronavirus crisis also worked to the detriment of the Leesoffensief [Reading Offensive], a collective effort begun in 2019 to promote reading that is increasingly necessary due to the rapid decline in reading skills and reading enjoyment.

There is also an increasing awareness of the need to make the literature sector more diverse and inclusive, resulting in a range of ambitions, initiatives, and research projects. Book trade renewal is also reflected in various forms of innovation – focusing, for example, on new ways of using metadata, book recommendations, digital literature and performance art.

Note: Links and sources may be in the Dutch language only.

1. INTRODUCTION AND KEY FIGURES

The Dutch literature sector is characterized by a high degree of cooperation[14] and collectivity, with joint regulations and agreements such as the law on fixed book prices and the model contract for original Dutch literary work. In addition to the many partnerships, there is also an extensive knowledge infrastructure. This knowledge infrastructure includes the Leesmonitor [Reading Monitor] of Stichting Lezen [Dutch Reading Foundation], the library network Bibliotheeknetwerk (including Bibliotheekinzicht) from the National Library and the various monitors of the knowledge and innovation platform KVB Boekwerk. Based on these monitors, additional sources and discussions with stakeholders, the Culture Monitor provides an overview of the most important themes, developments and sticking point within the literature domain.

In 2021, this domain consisted of 17,900 active authors[15] and 2,900 active translators, who released 11,700 new titles through 4,045 publishers[16] (KVB Boekwerk 2022h, 2022i). Only a very small proportion of these authors and translators can live entirely from book sales, which means that most of them supplement their income with, for example, commercial writing assignments, performances, and subsidies or grants (KVB Boekwerk 2019a, 2019b, 2021e). In 2021, at least 5,290 author performances[17] took place and the Dutch Foundation for Literature provided 7.6 million euros in regular subsidies, in addition to 14.9 million euros from the pandemic support packages (Nederlands Letterenfonds 2022).

[14] When researchers at Utrecht University investigated the resilience of the book trade in 2021, collaboration turned out to be the most widely shared value – after the accessibility of literature – from which the book trade operates (Braber et al. 2021).

[15] An author or translator is considered active if they have published at least one new work in the previous five years.

[16] By far the largest part of this group consists of small publishers, with an average turnover of 28,000 euros. Of the 4,045 publishers, 42 publishers are responsible for 75 per cent of the turnover of the book market (KVB Boekwerk 2022i).

[17] The number refers to the number of contracts for author performances concluded via the author-booking organization, De Schrijverscentrale. It is important to note that one contract can include several performances, and not every author performance is booked through De Schrijverscentrale. In the period 2010-2019, De Schrijverscentrale concluded an average of 4,890 contracts – this fell to 2,922 in 2020 as a result of the pandemic. The high number of contracts concluded in 2021 was partly due to three Support Measures for Writers from the Dutch Foundation for Literature, which stimulated author performances.

Authors and translators

This figures below provides key information from KVB Boekwerk about the number of active authors and translators (1), their income from royalties (2), as well as on the number of contracts for performances by authors arranged by author performance agency De Schrijverscentrale (3, see next page).

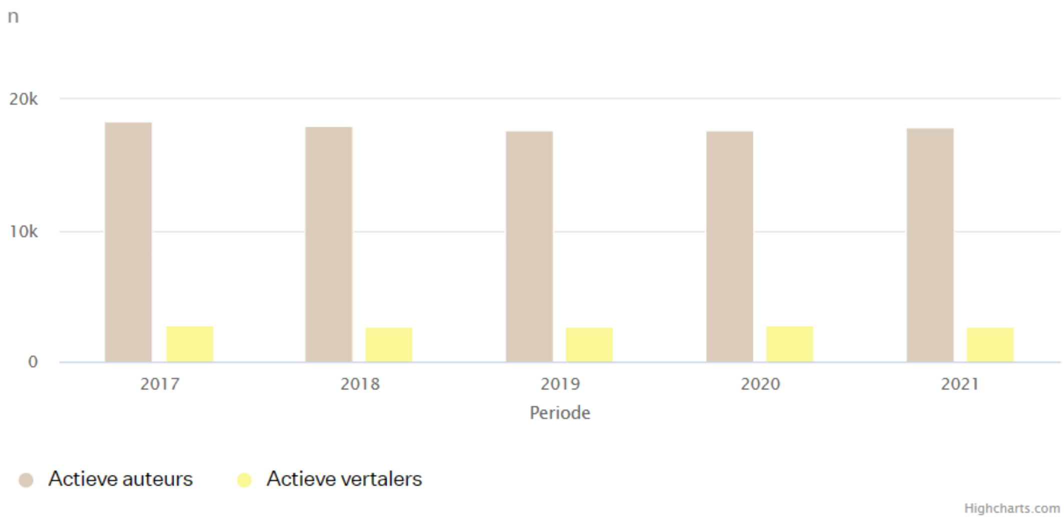

Figure 1: **Number of active authors and translators.**
[Year; Active authors; Active translators]
Source: KVB Boekwerk and De Schrijverscentrale

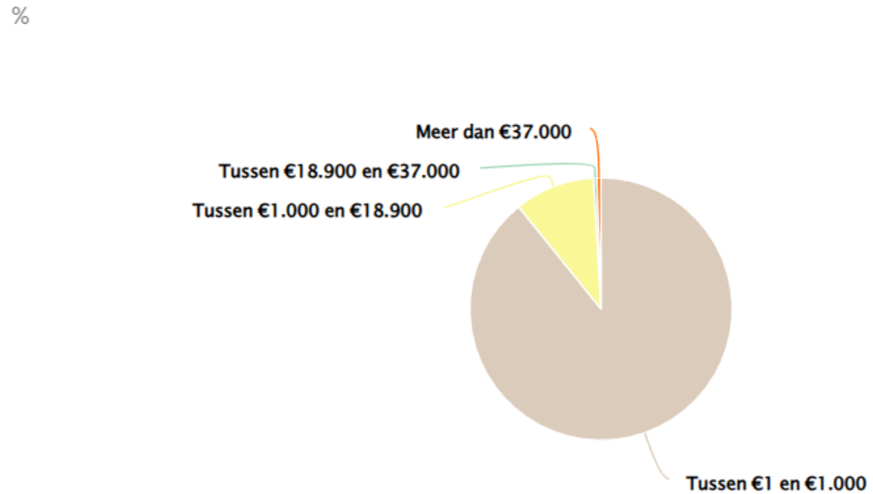

Figure 2: **Author (%) by annual income from royalties in 2020.**
[Over €37,000; Between €18,900 and €37,000; Between €1,000 and €18,900; Between €1 and €1,000]
Source: KVB Boekwerk and De Schrijverscentrale

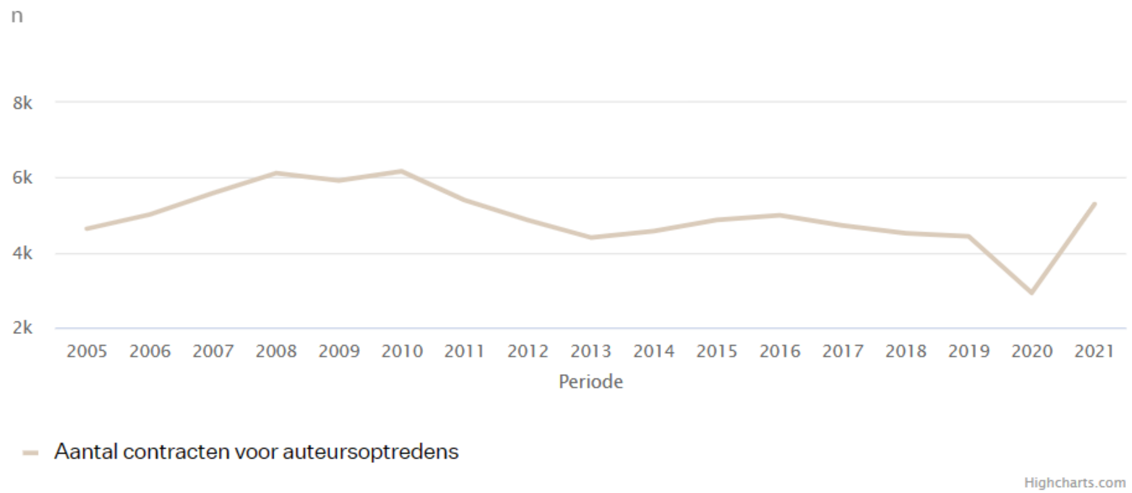

Figure 3. **Number of contracts for performances by authors arranged by De Schrijverscentrale**
[Year; Number of contracts for performances by authors] Source: KVB Boekwerk and De Schrijverscentrale

In 2021, 43 million books were sold, amounting to 610,000 individual titles. Fiction books made up the largest share of sales (42 per cent), and foreign non-Dutch language books comprised 17.2 per cent of sales. These books comprised 17.2 per cent of sales. These book sales generated a turnover of 647 million euros. As in 2020, online stores had a higher share of turnover (58 per cent) than physical bookstores (42 per cent). This is the result of a long-standing development that has accelerated due to the coronavirus pandemic (KVB Boekwerk 2022d).

In 2022, on the other hand, the turnover share of physical bookstores increased again. The turnover of physical bookstores increased by 25 per cent compared to 2021, while the turnover of the e-commerce channel decreased by 11 per cent. As a result, physical stores and e-commerce each had a share of 50 per cent in the total turnover of the book market (KVB Boekwerk 2023).

Market

Based on statistics from KVB Boekwerk, the figures on this page provide insight into the market for Dutch books, excluding academic and educational publications. The first two graphs show the total sales and market turnover. In the third figure (next page), the turnover is then broken down by sales channel.

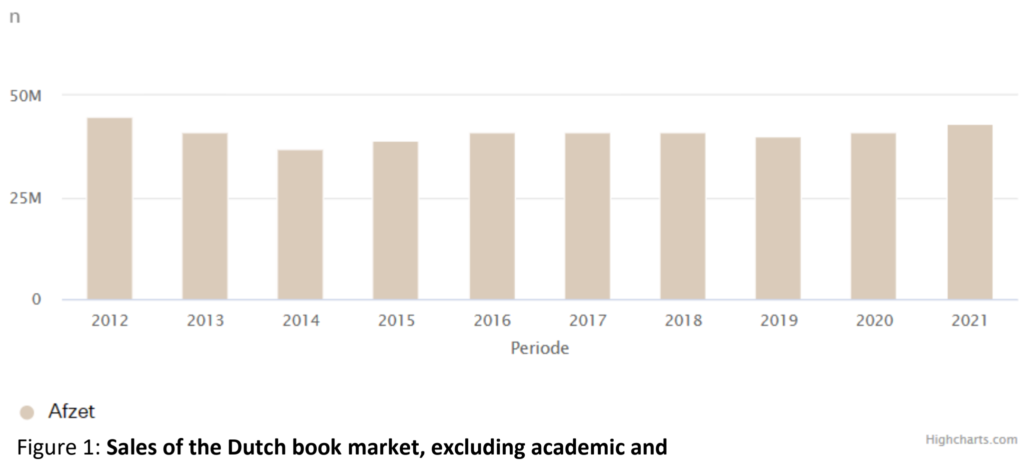

Figure 1: **Sales of the Dutch book market, excluding academic and educational publications and including e-books**
[Period; Sales]
Source: KVB Boekwerk

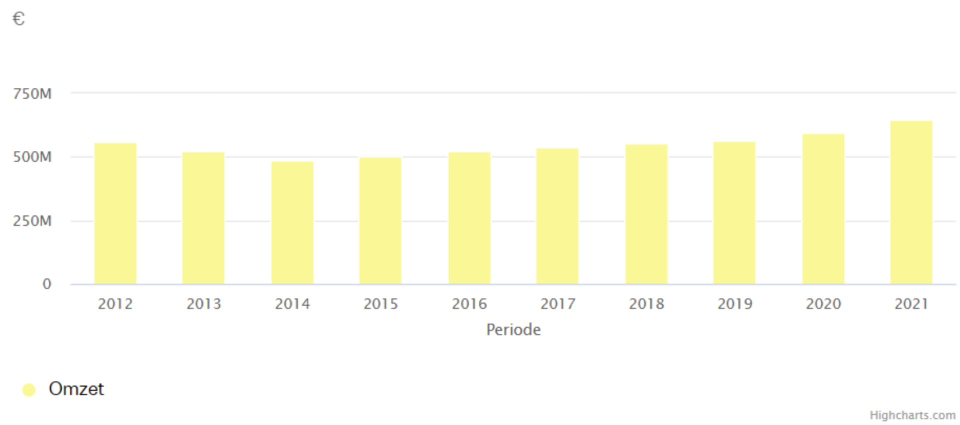

Figure 2: **Revenue of the Dutch book market, excluding academic and educational publications and including e-books**
[Period; Revenue] Source: KVB Boekwerk

Books could also be found in 1,247 library locations[18] in 2021 (KB 2022b), where 39.6 million physical books and 7.3 million e-books and audio books were borrowed by 2.2 million youth members and 1.2 million adult members. This ratio between physical and digital lending has been strongly influenced by the library closures due to the coronavirus pandemic: in 2019, 61 million physical books and 5.6 million e-books and audio books[19] were lent (CBS 2022b, 2022c). However, lending books is only one aspect of the increasingly societal role that libraries play. Libraries make knowledge and information available, offer opportunities for development and education, contribute to promoting reading, stimulate meeting and debate, and introduce people to art and culture (KB 2022a). They contribute to major social challenges[20] such as a literate society, the acquisition and further development of (foundational) skills, and (digital) participation and inclusion in the information society (VOB et al. 2021). This is reflected, for example, by the increasing number of activities taking place in libraries. Between 2015 and 2019, this number almost tripled from 78,745 to 220,381, after which it decreased to 142,570 in 2020 and 136,374 in 2021 as a result of the coronavirus pandemic (KB 2022a).

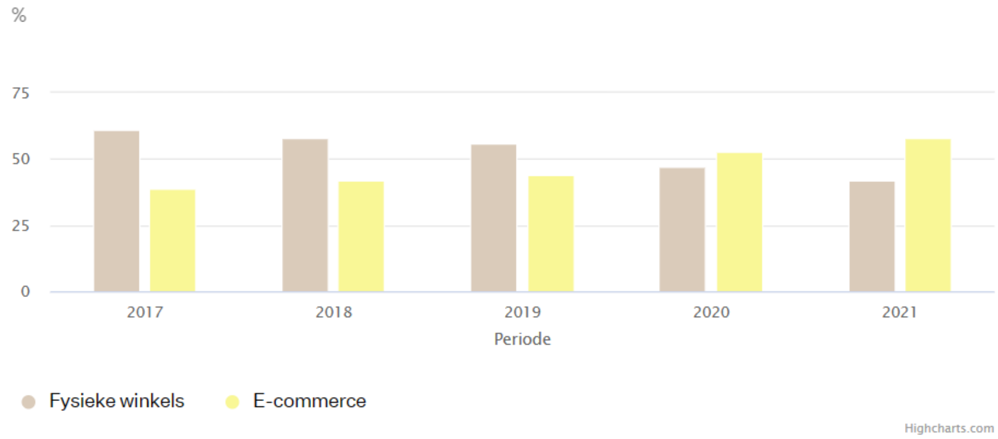

Figure 3: **Revenue of the Dutch book market, excluding academic and educational publications, by sales channel, 2017-2021**
[Period; Physical stores; E-commerce]
Source: KVB Boekwerk

[18] This includes branches, service points, mini-service points, self-service libraries, collection points and mobile library bus stops. The number of branches and service points (i.e. all locations with their own collection that are staffed for at least 5 hours a week) was 907.
[19] Loans via the regular online library only. In addition, almost 1.3 million books were lent out through the temporary 'Holiday Library' in 2019. This campaign did not take place in 2021.
[20] Libraries can also play an important role in the current energy crisis. For example, energy coaches hold a consultation hour in various libraries, and libraries offer a warm and freely accessible place where everyone can go (see, for example, Gommers 2022).

Public libraries

Public libraries are undergoing a transformation from traditional lending libraries to organizations with a broad societal function. This is reflected in the figures collected below from the National Library (KB) and Statistics Netherlands (CBS): although the number of loans is falling, the number of activities and events organized by libraries was on the rise until the outbreak of the coronavirus pandemic in 2020.

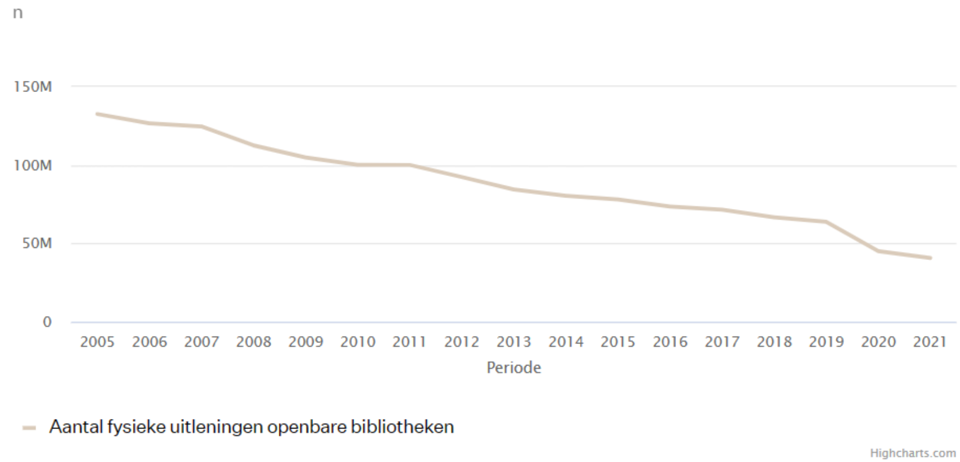

Figure 2: **Number of physical loans from public libraries**
Sources: CBS and KB

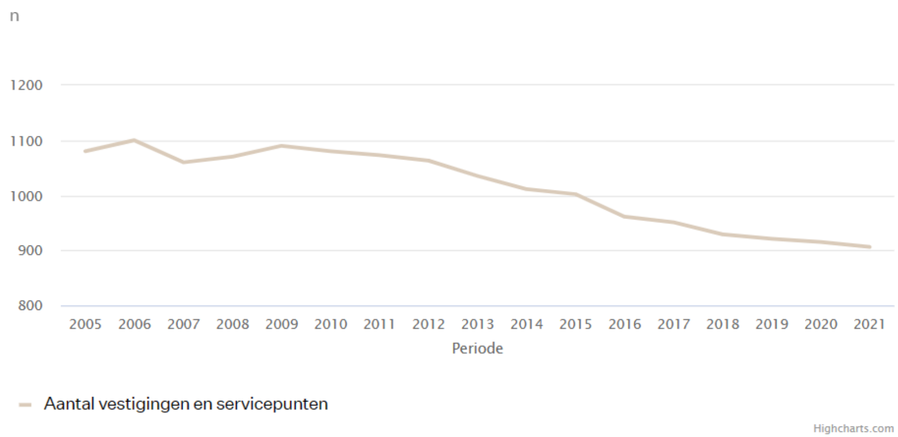

Figure 1: **Number of library locations and service points**
Sources: CBS and KB

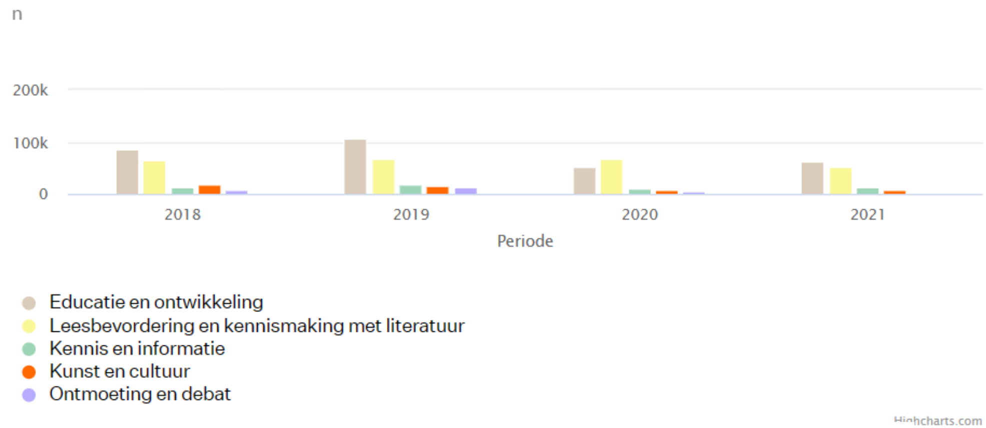

Figure 3: **Number of activities organized by core function, 2010-2021**
[Education and development; Promoting reading and literature; Knowledge and information; Art and culture; Meeting and discussion]
Sources: CBS and KB

2. TRENDS AND DEVELOPMENTS

Time for a reading offensive

When the international PISA study on (among other things) the reading enjoyment of 15-year-olds published its results at the end of 2019, the conclusions were gloomy. Of all 77 countries surveyed, Dutch schoolchildren appeared to enjoy reading the least. 42 per cent of them thought reading was a waste of time, and 53 per cent never read for pleasure. Compared to 2015, the reading skills of Dutch teenagers had also decreased significantly (Gubbels et al. 2019, Dood et al. 2020).

These figures form part of a long series of studies that, considered collectively, indicate that both young people and adults have been reading less for years.[21] Moreover, young people start to enjoy reading less and less as they get older, with reading media often losing out to other media in their free time (Leesmonitor 2021b, 2021c).

The reduction in reading and declining reading skills among children and youth is therefore among the most important themes in the literature domain. The sector is trying to combat this with numerous campaigns, interventions and programmes.[22] Every year, it reaches tens of thousands of young people with programmes such as BoekStart and the Bibliotheek op school [the Library at School], the teaching programmes of De Schoolschrijver [the School Writer], the author performances of De Schrijverscentrale and campaigns such as Nederland Leest [The Netherlands Reads], the Boekenweek van Jongeren [Youth Book Week], the Jonge Jury [Young Jury], Read2Me, Stap op de Rode Loper! [Step onto the Red Carpet!] and the National Reading Aloud Contest. Research shows that such programmes can have positive effects on reading motivation, reading skills and reading enjoyment (De Schoolwriter n.d., De Schrijverscentrale n.d., Reading Monitor 2021a, 2021e, 2022a, 2022b 2022d, 2022e, 2022g, 2022i).

In addition, much attention is paid to the place that reading and literature occupy in the permanent curriculum. Underlying the reduction in reading among the young is a complex interplay of possible causes, some of which originate in reading and literature education. In primary education, for example, reading enjoyment may decrease due to the shift from reading for pleasure to reading for benefit, and from voluntary to compulsory reading (Leesmonitor 2021b). In secondary education, negative reading experiences can result for example from the too rapid (for some pupils) transition from children's literature to books for adults, from the content of the reading list[23] or from the great emphasis on reading comprehension and reading strategies (Leesmonitor 2022h, Dera 2019, Noordduijn 2020, Engelshoven et al. 2020).

Many schools are doing a lot to prevent negative reading experiences and to offer positive ones. For example, primary schools are increasingly focusing on free reading, and

[21] For example, between 2006 and 2016, the proportion of people aged 12 and older who read for at least ten minutes per week fell from 90 to 72 per cent (Wennekers et al. 2018). The share of Dutch people aged 13 and older who read a book at least once a week decreased from 51 to 43 per cent between 2009 and 2018, although it has remained fairly stable since then (KVB Boekwerk 2018, Nagelhout et al. 2020, Richards et al. 2021).

[22] For an overview of reading or book promotion campaigns, see, for example, the websites of Stichting Lezen [the Reading Foundation] and the CPNB.

[23] Research shows that although students rate their reading list as 6.7 on average, the books that are read the most (and may be compulsory) are not valued the most. The reading list also appears to lack diversity, mainly containing the work of white male authors (Dera 2019). This directly affects reading motivation: "Research in the field of reading promotion has (...) shown that pupils who systematically see nothing of their own background in texts can develop motivational problems that hinder the development of their literacy" (Dera 2020). Many teachers are also not in favour of the compulsory reading list: only a quarter of them think this is a good way to get students to read (KVB Boekwerk 2022e).

secondary education is increasingly concentrating on young-adult fiction as a bridge between youth and adult literature (Leesmonitor 2022c, Leesmonitor 2022h, Stichting Lezen 2022b). It is also positive and important that the plans for the new educational curriculum call for a greater place for reading motivation, and that a start has been made on renewing the Dutch exam programme as of 2022 (Curriculum.nu 2019, Engelshoven et al. 2020, Teunis 2022).

It is clear that the literature sector and education must go hand in hand in promoting reading. This is therefore an important part of the ‘reading offensive’ that the Raad voor Cultuur [Council for Culture] and the Onderwijsraad [Dutch Education Council] called for in 2019 (Council for Culture et al. 2019). In 2020, the Leescoalitie[24] [Reading Coalition] and several partners sounded the alarm and reiterated the need for an ambitious reading offensive in a manifesto. To this end, an appeal was made to all reading promotion, education and other social organizations to work together on reading promotion based on a shared vision and with (even) more cohesion. The ministry was also expressly asked for more efforts and extra investments (Leescoalitie 2020).

The then Ministers of Education responded to these calls in 2019 and pledged to work towards a better structural embedding of reading skills in education, encouraging more reading enjoyment and drawing up an action agenda with social partners (Engelshoven et al. 2019, 2020). Since then, discussions and consultations have taken place, projects have been started or continued, public libraries have been able to make use of a temporary subsidy scheme, and local reading initiatives[25] have also been launched (Engelshoven et al. 2020, Bibliotheeknetwerk 2020, Dalen 2021).

In May 2022, the State Secretary for Culture and Media, Gunay Uslu, who took office at the beginning of 2022, wrote in her cultural briefing for 2022 that the cabinet would continue to work on a future-proof library facility in every municipality, and that the ministers and State Secretary of the Ministry of Education, Culture and Science would continue to make joint efforts to encourage cooperation between schools, libraries and the environment around young people in the area of reading promotion (Uslu 2022a). In the *Masterplan Basisvaardigheden* [Masterplan For Basic Skills], Minister for Primary and Secondary Education Dennis Wiersma also paid much attention to increasing reading skills and motivation (Wiersma 2022). This was made concrete at the end of 2022 when it was announced that the State Secretary and Minister would jointly structurally invest more than 60 million euros in libraries and reading promotion. Municipalities are also obliged[26] to provide future-oriented library facilities for their residents (Uslu 2022b, Uslu 2022c, Stichting Lezen 2022c). A further development in 2022 is that the Library Act was amended[27] so that everyone under the age of 18 can become a member of the library free of charge (Stichting Lezen 2022a).

[24] The Leescoalitie consists of Stichting Lezen, the CPNB, Stichting Lezen & Schrijven, the National Library, the Vereniging van Openbare Bibliotheken, the Foundation for Dutch Literature and the Literatuurmuseum/Kinderboekenmuseum.

[25] See here for an overview of some local reading ‘offensives’.

[26] In the current law pertaining to library facilities, the tasks of municipalities with regard to libraries are formulated as ‘promotional tasks’. The intention is to amend the law in 2025, creating a legal ‘duty of care’. To this end, extra resources will be structurally added to the municipal fund (Uslu 2022c).

[27] Although this was already the case in practice at the vast majority of libraries. However, before the amendment to the law, libraries were allowed to charge young people a contribution that amounted to a maximum of half of the adult contribution.

Impact of the pandemic

During the coronavirus pandemic, the proportion of people reading and the frequency of reading by readers increased (KVB Boekwerk 2021d, 2022f, 2022g). The market also did well: book sales increased by 3.7 per cent compared to 2019[28] and turnover by 5.9 per cent (KVB Boekwerk 2021b). Moreover, another positive result followed in 2021: sales and turnover rose by 4.6 and 8.4 per cent respectively compared to 2020 (KVB Boekwerk 2022d).

However, this is only part of the story, because although the market grew, not everyone benefited from this (KVB Boekwerk 2021a). The e-commerce channel's market share has been growing for years, but this development gained momentum in 2020. Online stores saw their turnover increase by 27.4 per cent, while physical stores suffered a loss of 10.2 per cent. For the first time, the turnover of online sellers (53 per cent) was greater than that of physical stores (47 per cent) (KVB Boekwerk 2021b). This development continued in 2021, and the turnover share of physical bookshops fell further to 42 per cent (KVB Boekwerk 2022d). In 2022, on the other hand, the turnover share of physical bookstores increased again. The turnover of physical bookstores increased by 25 per cent compared to 2021, while the turnover of the online booksellers decreased by 11 per cent. As a result, physical and online stores each had a share of 50 per cent in the total turnover of the book market (KVB Boekwerk 2023).

We do not know how many bookstores have had to close their doors[29] because of this, although the Koninklijke Boekverkopersbond [Royal Booksellers Association] speaks of 'tens' and Statistics Netherlands [CBS] saw the number of bookshops fall by 2.5 per cent in 2020 and by 8.1 per cent in 2021 (Nieuwsuur 2021, CBS 2021, CBS 2022a). The coronavirus crisis is an important reason for this, but the pre-existing advance of web shops, the emptying of the physical high street and difficulty in finding successors also play a role.

Although all restrictive coronavirus measures have been lifted at the time of writing, this does not necessarily mean that all the problems are over. During the pandemic period, bookstores had higher costs and debt, and less money to invest in offerings or inventory. In addition, most of the generic support measures that entrepreneurs could use have now lapsed. A follow-up question is, how stores are being affected by the current energy and inflation crisis.

In addition to physical bookstores, authors generally also had a hard time during the pandemic. For example, there were certainly fewer opportunities to earn income from performances[30] – which has major consequences for performance artists, for example – and the decrease in library loans also led to a decrease in lending rights fees (Lira 2021). Authors might also have had to deal with books that were postponed – particularly where these were debuts or literary works that depended heavily on visibility in the store (Becker 2021).

[28] For the sake of completeness, it should be noted that 2019 was not a particularly good year. Sales decreased compared to 2018, and the small increase in turnover this year is mainly explained by the increase in VAT on books. For a comparison of these figures with some other European countries, see, for example, FEP 2021 and FEP 2022.

[29] If bookshops cease to exist, this is cause for concern – not only for those involved, but also because when a bookshop closes, only some of the buyers look for other suppliers, while part of the demand disappears completely (Götz et al. 2020).

[30] For example, the agency De Schrijverscentrale concluded 34 per cent fewer contracts in 2020 than in 2019. Partly due to extra support measures from the Dutch Foundation for Literature, however, the tide was turned in 2021, and 19 per cent more contracts were concluded than in 2019 (De Schrijverscentrale 2022).

All this comes on top of developments that have been putting pressure on the income position of authors for some time now. For example, book sales have remained stable in recent years, but each year a slightly larger share of the turnover goes to foreign non-Dutch language books and bestsellers (KVB Boekwerk 2019b). The lending rights fees have also been falling for years because fewer books are being lent (Lira 2021).
In recent years, considerable attention has been paid to the fees for the increasing number of loans via school libraries. Due to an education exemption in the Copyright Act, lending rights fees sometimes had to be paid for these loans (if the loaned book was owned by the library) and sometimes not (if the loaned book was owned by the school). This led to confusion and conflict. In July 2022, new agreements were therefore made by all parties involved, including an amendment to the Copyright Act. From now on, the Ministry of Education, Culture and Science will make 3.5 million euros available annually for loans via libraries at schools, in addition to a one-off payment of 6 million euros compensation for creators for missed fees in previous years (Auteursbond 2021, Auteursbond 2022, Stichting Lezen 2021, VOB 2022).

Share of literary-cultural segment and bestsellers

These figures from KVB Boekwerk show that book sales consist of a larger number of individual titles every year. In 2021, 610,000 unique titles were sold, of which 140,000 were in Dutch. Nevertheless, just 250 top titles generated 22 per cent of the total Dutch-language book turnover.

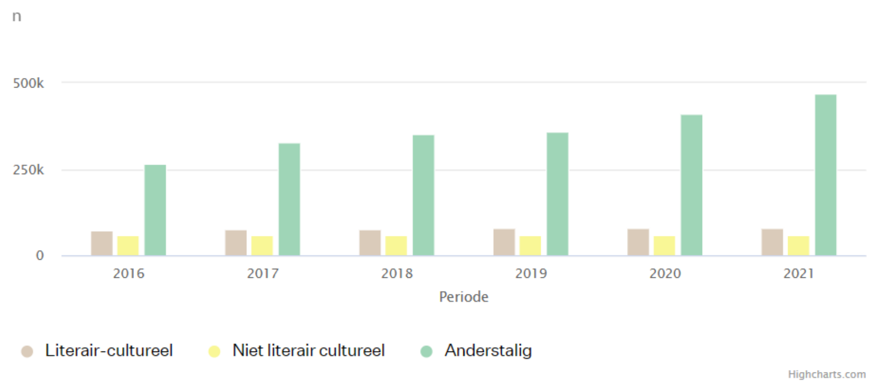

Figure 1. **Number of individual book titles sold per year between 2016 and 2021**
[Literary-cultural; Non-literary cultural; Foreign-language] Source: KVB Boekwerk

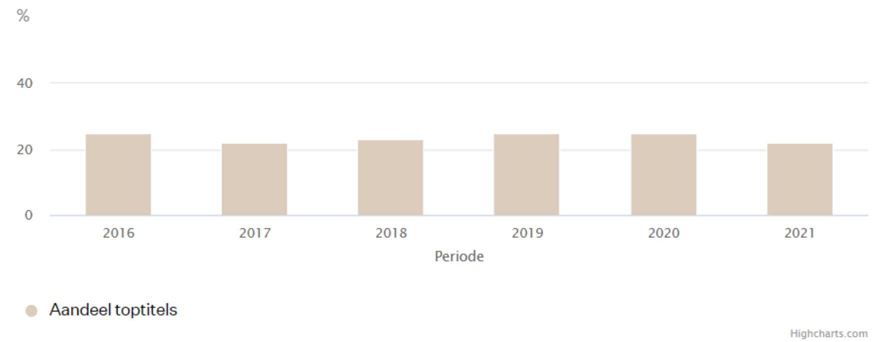

Figure 2. **Share of the 250 top-selling books in total Dutch-language book turnover, 2016-2021**
[Share of top sellers] Source: KVB Boekwerk

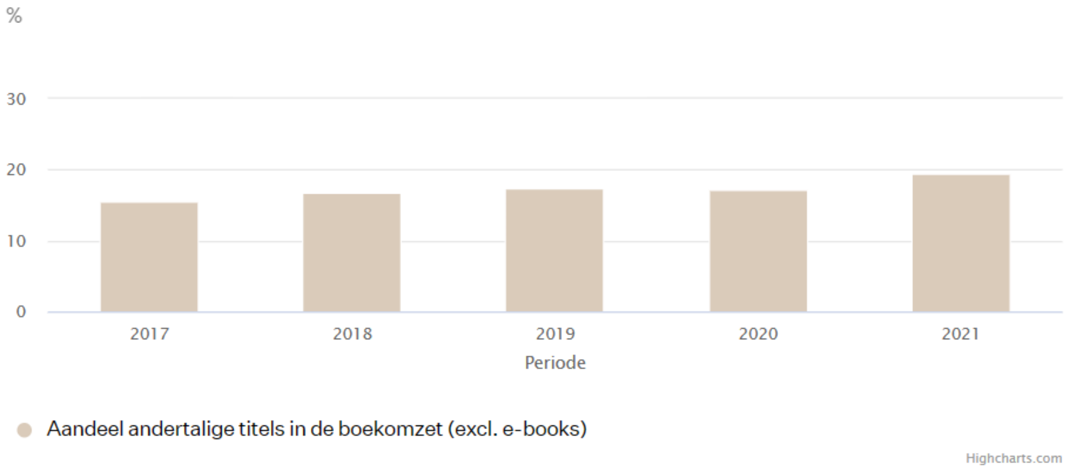

Figure 3. **Turnover share of foreign-language titles, 2017 – 2021**
[Share of foreign-language titles in book turnover (excluding e-books)]
Source: KVB Boekwerk

The digitization of the book market also presents challenges for authors, for example due to the emergence of streaming and subscription services for e-books and audiobooks. These platforms determine how much each publisher and author gets paid, but this is not always clear or agreed upon.[31] For example, is payment made when a book has been read for a certain amount of time, or after a certain number of pages have been read? A recent development in this regard is Secretary of State Uslu's announcement in May 2022 that an additional 3.15 million euros would be invested in digital loans from public libraries, for the benefit of authors and their publishers (Uslu 2022a).

The pandemic is also having a negative effect on the reading skills of schoolchildren. Compared to previous cohorts, primary school students were seven weeks behind in reading comprehension after one and a half school years with lockdowns. In secondary education, the backlog in reading skills (in Dutch) amounted to an average of 27 weeks, rising to a full school year for pre-vocational secondary education students (Leesmonitor 2022f).

The pandemic also affected libraries.[32] The financial consequences are relatively limited for the time being, partly due to financial support measures. It is true that their income fell and many libraries had extra costs (for example for hygiene measures), but subsidies from municipalities and provinces increased (CBS 2022c, KB 2021c). A bigger impact was felt on the number of physical loans, which decreased by 30 per cent in 2020 and another 10 per cent in 2021 (CBS 2022c). However, this was partly compensated by an increased use of the online offer (CBS 2022b). Finally, the number of activities that libraries could organize fell by 35 per cent in 2020 and 4 per cent in 2021, although there was plenty of experimentation with new (digital) offerings and adapted services (KB 2022a). The library

[31] However, a new European directive was adopted in 2019, which, among other things, obliges operators to provide more transparency towards rightsholders. At the end of 2020, this guideline was also implemented in Dutch legislation (Europees Parlement et al. 2019, NVPI 2022).
[32] For extensive documentation of the impact of the coronavirus crisis on public libraries, see the dossier 'De bibliotheek in coronatijd' ['The library in times of coronavirus'] by the Library Network.

also underlined its social function during the pandemic. For example, the importance of digital skills increased, to keep in touch during the lockdown or to request a vaccination or the CoronaCheck pass. Libraries helped many with these and other basic skills, especially among vulnerable groups (KB 2021a, KB 2021b, Hoenders et al. 2021).

In order to get through the coronavirus crisis as well as possible, the literature sector initiated numerous campaigns and new (digital) initiatives. In addition, various support measures were set up. The Auteursbond [Authors' Union] made three support schemes available for authors from the Steunfonds Rechtensector [Support Fund for the Rights Sector] (Auteursbond 2020a, 2020b). Partly on the basis of the government support packages for culture, the Dutch Foundation for Literature designed various support measures. These focused on, for example, author performances, reading and writing programmes in schools, campaigns to promote reading, translations, risk-bearing literary publications, physical bookstores and author development programmes to (continue to) reach new or existing audiences. These temporary support measures amounted to 2.8 and 14.9 million euros in 2020 and 2021 respectively (Nederlands Letterenfonds 2021a, 2021b, 2022a).
Where the emphasis in the above was on the negative impact of the coronavirus crisis, the literature sector also saw positive consequences. More was read and more was read aloud (Leesmonitor 2021d). The value and importance of books, of the library and of the (local) physical bookshop were once again confirmed. Innovation gained momentum and cooperation and collectivity within the sector were strengthened.

Diversity, equity and inclusion in literature

Against the background of Black Lives Matter and the introduction of the Diversity & Inclusion Code, there was much attention given to diversity and inclusion in the literature sector in 2021.[33] Another direct reason for this was the translation into Dutch of Amanda Gorman's first collection of poems and her inaugural poem *The Hill We Climb*. The translator initially chosen, Marieke Lucas Rijneveld, resigned from the assignment after discussion and criticism arose because a Black translator or spoken-word artist had not also been asked to translate the work of the Black spoken-word artist Gorman. In the end, Zaïre Krieger signed to do the translation, which was published in September 2021 (Bahara 2021).

That the literature sector lacks diversity seems to be generally acknowledged and has been known for a long time.[34] Various studies underline this picture. For example, the work of female authors is structurally less appreciated in the literary field (Koolen 2018), Dutch children's books mainly focus on the white perspective (Bossche 2020), (unconscious) (pre)judgments play a role in the publishing profession that work to the detriment of authors of colour (Koren et al. 2019, Saha et al. 2020) and "the image of the white, male writer from the Netherlands" dominates reading lists in secondary education (Dera 2019). This selection of available studies also shows that it is not only about cultural diversity and diversity among the people who work in the book trade. Also important are the diversity of the stories that

[33] For example, on Monday, 6 September 2021, the debate evening 'Diversiteit in de letteren: de vertaalslag' ['Diversity in the arts: the transition'], took place in De Balie. This conversation can be viewed.
[34] See, for example, the digital clipping folder on diversity and literature on the website of the Personagebank [Character Bank,] with sources dating back to 1997.

are published and the extent to which books are accessible to everyone. All these forms of diversity can reinforce each other.

According to discussion partners, awareness of the need to take action on diversity in 2021 has increased sharply. One such action is to gain more insight into the state of affairs in the field of diversity and inclusion within the literature sector. At the beginning of 2022, KVB Boekwerk therefore published an initial exploratory study into where the book trade stands in terms of diversity and inclusion.[35] To this end, a survey was completed by 203 authors, 129 translators and 31 publishers. The results are mainly indicative but show that diversity and inclusion are seen as important by a large proportion of the respondents, and that a significant proportion also pays attention to this. At the same time, this attention is often neither structural nor embedded in an organization. There is therefore still room for improvement: for example, the diversity of the range of books on offer is barely sufficient, and the book trade is still mainly seen as a white and highly educated stronghold (KVB Boekwerk 2022b).

Research[36] into diversity is also being conducted in the library sector. The National Library and TU Delft are collaborating on a study that examines the diversity of library collections and loans, as a possible basis for a new recommender technology "that does more justice to the multiformity and multivocality of the library" (Bibliotheeknetwerk n.d.a). At the beginning of 2022, the KB and CBS jointly published a new dashboard that gives public libraries more insight into the members and non-members in their area (Bibliotheeknetwerk 2022). In June 2022, a study was also published that showed that diversity and inclusion in the collections of school libraries are considered important, but for various reasons are experienced as difficult to achieve in practice[37] (Bruin et al. 2022).

In addition to research, however, taking action is especially important. Many organizations in the chain have expressed ambitions, or already taken steps, to contribute to a more inclusive literature sector. In addition, there are numerous organizations and initiatives that play a particularly important and valuable role in this. At the beginning of 2022, KVB Boekwerk gathered 31 Dutch initiatives that are committed to diversity and inclusion in the book trade (KVB Boekwerk 2022c). For a diverse and inclusive range of (children's) books, book buyers can, for example, go to the EduCulture bookstore, or they can take out an inclusive book subscription at Books by Ani. This more diverse range of books comes from publishers such as Rose Stories, Uitgeverij Wilde Haren or Uitgeverij Pluim in collaboration with the Dipsaus podcast. Organizations such as Alphabet Street ("guild for Black (visual) linguists"), think tank De Tank ("editors and think tank of colour"), Poetry Circle ("the national platform for writing performers and performing writers") and El Hizjra ("literary bridge builder between the Netherlands and the Arabic-speaking world") are also committed to a diverse group of authors, connecting them with each other or with the public.

[35] For this purpose, four forms of diversity were examined: ethnic-cultural background, gender identity, sexual identity and physical limitations.
[36] In 2019, a survey on diversity was already distributed among public libraries in preparation for the National Library Congress, and since 2020, questions about staff diversity have been part of the WSOB data delivery. The results of these questionnaires show that libraries within their workforce are fairly diverse in terms of skills, education level and knowledge, but hardly or much less in terms of age, gender and cultural background (KB 2021d, 2022c).
[37] The obstacles mentioned in the study are the vision of (strictly) religious schools, the selection of books available, the provision of information about available books, and constraints in time and budget.

Innovation inside and outside the book

Partly as a result of digitization, major changes have taken place in production, distribution and consumption in, for example, music, games and audio-visual domains in recent years. This is less the case in the book trade. Printed books still make up 92 per cent of total book sales, and about half of these books are sold in physical bookshops (KVB Boekwerk 2022d).

Nevertheless, innovation is taking place in all sorts of ways around the printed book. For example, there are innovative new ways of enabling books and readers to find each other and, in 2020, consideration was given to greater efficiency and cost savings in the chain as part of the so-called "Delta Plan for the book trade". This resulted in six innovation projects and a research project, some of which have now been completed (KVB Boekwerk 2021c, 2022a). An interesting project among these is theme coding, which distribution company CB has made mandatory for Dutch-language books in the so-called A category since 1 January 2022. This theme coding makes it possible to categorize books in much more detail.[38]

With this coding, bookshops or libraries can make much more specific recommendations, and readers can search for books themselves more easily.[39] From the point of view of diversity, this is also an interesting development: not only could the theme coding provide better insight into the diversity of stories that books tell, but it would also make it easier for a reader to find those diverse stories (Dessing 2018).

There are also efforts aimed at making book production and distribution more sustainable. For example, publishers are looking for ways to have books printed as sustainably as possible and to optimize print runs (Klein Lankforst 2019, Dessing 2022a, GAU 2022), and distributors are making steps in the field of packaging material and transport (see, for example, Bol.com n.d., CB n.d.b). More and more bookshops are also taking sustainable measures (Dessing 2022b).

A recent and much-discussed form of innovation was library-support organization NBD Biblion's announcement, in March 2022, that book reviews would henceforth be written by artificial intelligence, replacing the current 700 human reviewers. While this software can make book information available to libraries more quickly, there are concerns about the quality of the artificial texts and their impact on library collections and knowledge about books (Jong 2022).

BookTok is a form of innovation that originated from readers rather than the book industry. This is a community within the TikTok platform, whose users make videos about books they've read or tips they want to share. BookTok is especially popular among young people, and it seems that they are also reading more as a result. Books in English are particularly popular here (see, for example, Bakker 2021).

Innovation is also taking place outside the traditional book, for example in the field of digital reading and digital literature. For example, most of the entries on the longlist of

[38] In addition to a global topic (such as "dystopian and utopian fiction"), the code can include attributes that say something about the location, language, time period, educational purpose, interest, and style of the book. In combination this gives almost endless possibilities (CB n.d. a). If someone were to write a postmodern comic fantasy novel set on the Wadden Islands on 1 January 2040, it could be coded. See here an overview of the available codes.

[39] CB also writes that titles with a theme code are more easily found and bought more often than titles without a theme code (Robbers 2020).

the Renew the Book 2022 innovation prize related to digital reading, including the eventual winner Pathbooks[40] (Renew the Book 2022). Other examples include research into the possibilities of making digital literature part of library collections, the interactive and digital lesson planning tools for reading and writing [Jaarlijn Lezen and Schrijven] by De Schoolschrijver, or the collaboration of the Leescoalitie [Reading Coalition] with games developer Ubisoft aimed at getting young people to read through digital game stories (Library network n.d. b., Buitenhuis 2021).

Finally, in addition to digital literature, spoken literature is also on the rise. The emergence of podcasts and audiobooks is not a recent development, but their rapidly increasing popularity is. For example, the number of audiobooks downloaded from the library increased elevenfold between 2015 and 2021, and the proportion of people who sometimes listen to podcasts rose from 28 per cent in May 2019 to 49 per cent in June 2022 (CBS 2022b, Zigt 2021, Markteffect 2022). Another form of spoken literature is offered by the work of spoken word artists and reciters. Although spoken word is certainly not new, it is a discipline that is receiving increasing attention. Since 2018, for example, these makers have been able to join De Schrijverscentrale performance agency, and from 2021 they have been able to apply for a structural subsidy from the Dutch Foundation for Literature for the first time. In 2022, the fund also opened a new subsidy scheme for “creators outside the book” (Nederlands Letterenfonds 2020, 2022b).

Use of the digital library

The use of the national digital public library has increased in recent years, showing particularly strong growth during the coronavirus pandemic. The numbers in the figures below concern only licenses and loans via the regular channels, and therefore do not include temporary campaigns such as the VakantieBieb or ThuisBieb [Holiday or Home Library].

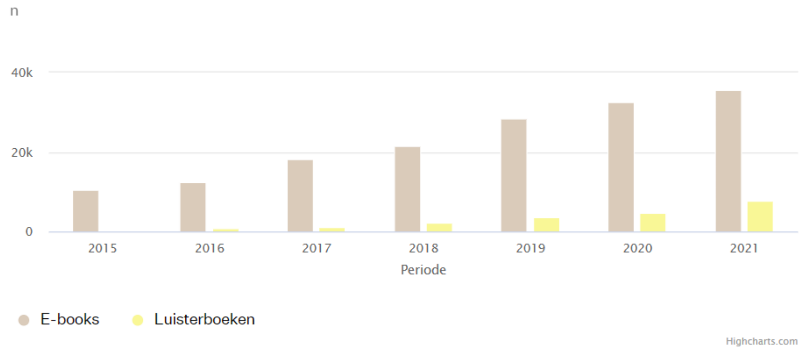

Figure 1. **Number of titles available to borrow from the national digital public library**
[e-books; audiobooks]
Source: CBS and KB

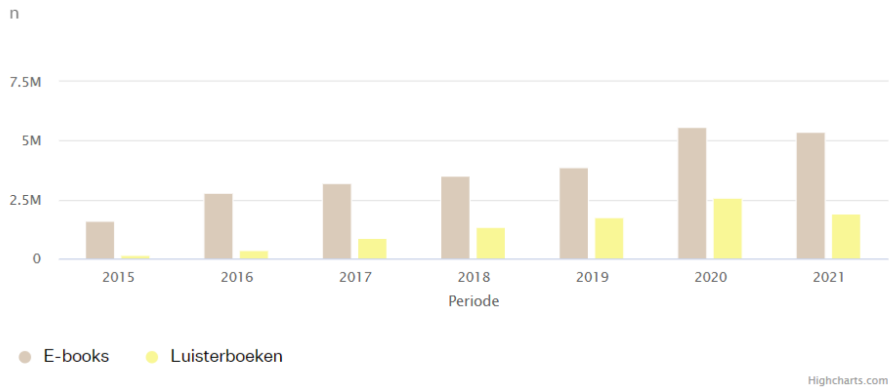

Figure 2. **Number of loans from the national digital public library**
[e-books; audiobooks]
Source: CBS and KB

[40] “An app that makes it possible to determine the course and ending of a story yourself”, is how Pathbooks is described on the Renew the Book website.

3. WHAT ELSE WOULD WE LIKE TO KNOW ABOUT THE LITERATURE DOMAIN?

As previously mentioned, the literature domain has an extensive knowledge infrastructure, and a great deal of research is already being carried out by all links in the chain. However, one wish that was mentioned in discussions for this analysis was for more insight into, and interpretation of, regional data. How does the literature consumption differ per region, and how can the market, and reading promotion activities for example, respond to this? In October 2022, data on this was added to the Dashboard of the Culture Monitor. In addition, the Regional Culture Monitor of the Boekman Foundation and Atlas Research also contains a chapter on regional distribution in literature (Berg et al. 2022).

Another desire for the Culture Monitor as a whole is to make and show comparisons between different domains within the cultural sector. This would indicate how and where domains intersect and would offer the opportunity to be inspired by or learn from each other's practices.

Finally, the international context could also play a greater role in the future. For example, it would be useful to map international activities, translations from and into Dutch, and any changes that result from the coronavirus crisis. In addition, a comparison between the Dutch literature sector and abroad, just like a comparison with other domains, could possibly offer inspiration and new insights.

4. WOULD YOU LIKE TO KNOW MORE ABOUT THE LITERATURE DOMAIN?

See more data about the Literature domain in the Culture Monitor dashboard.

More on the Literature domain can also be found in the knowledge base of the Boekman Foundation.

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6. DISCUSSION PARTNERS

In 2021 we spoke to the following people when gathering information for this domain page:

- Eveline Aendekerk (literature promotion organization CPNB)
- Niels Bakker (reading promotion organization Stichting Lezen [Reading Foundation])
- Joris de Bruin (literature promotion organization CPNB)
- Annemiek van de Burgt (KB [Dutch National Library])
- Martijn David (Groep Algemene Uitgevers [General Publishers Group])
- Klaas Gravesteijn (Vereniging van Openbare Bibliotheken [Association of Public Libraries])
- Marcel Hooft van Huysduynen (Auteursbond [Writers Union])
- Annemiek Neefjes (educational content development organisation De Schoolschrijver)
- Marjolein Oomes (KB [Dutch National Library])
- Tiziano Perez (Nederlands Letterenfonds [Dutch Foundation for Literature])
- Jurriaan Rammeloo (knowledge and innovation platform KVB Boekwerk)
- Anne Schroën (Koninklijke Boekverkopersbond [Royal Association of Booksellers])
- Mathijs Suidman (book distribution specialist CB)
- Annemarie van Toorn (Auteursbond [Writers Union])
- Roos Wolters (reading promotion organization Stichting Lezen [Reading Foundation])
- Anne Zeegers (De Schrijverscentrale author performance agency)

DOMAIN: DESIGN

The Design domain page deals with the job market, the problem-solving capacity of designers and trends such as inclusive design. Other themes include social design and sustainability. The Design domain encompasses a variety of disciplines: from illustration, graphic and spatial design to product design and fashion. Together with the Architecture domain, Design falls under the broader design sector – see also the online Design & Architecture domain page.

Written by Maxime van Haeren and Sabine Zwart
Latest update 17 January 2023

Work by Tomas Libertiny in exhibition *Design by Nature* at Museum de Fundatie / Photography: Lisa Maatjens

DESIGN

SUMMARY

Like architecture, design is used to address, solve or investigate urgent problems in society. The discipline of so-called social design is a concrete example of this. The phenomenon is certainly not new, but there is increasing social support for it, while it also contributes to a growing interest in inclusive design. The designer's field of work is broadening, and crossovers between design and other sectors occur more frequently.

In addition, the idea of sustainability is widespread in the design sector: designers are increasingly experimenting with new, organic materials and are on board with the global pursuit of reuse and circularity. The versatility and limitlessness of design make it an extraordinarily dynamic domain.

1. INTRODUCTION AND KEY FIGURES

Design is a multi-faceted domain[41] which has all kinds of intermediate forms and overlaps[42] with other sectors – both within and beyond the cultural field. A strict delineation of the design domain in the Culture Monitor is therefore neither possible nor desirable, according to discussions with the sector and our own research into the available data.[43]

At the same time, in terms of policy, design is part of the wider design sector, which also includes architecture and digital culture, as well as the cultural and creative industries.[44] The Culture Monitor follows this classification.

The visualizations on the next page contain data on the number of jobs in design as a cultural subsector, the number of designers in the entire job market, the subsidies for design from the Creative Industries Fund NL, and the distribution of subsidies from the Creative Industries Fund per discipline. You can switch between the different graphs via the tabs above each figure. In addition, the online Design & Architecture domain page contains overarching data about, for example, the turnover of freelancers and design agencies.

[41] In Dutch, there are several synonyms of the word 'design'. For example, the word 'vormgeving' refers to the way something is shaped, or the word 'ontwerp' refers to a sketch or defined plan (Van Dale, 2023). When gathering data about design in the Netherlands this can be a hurdle, because it can make it difficult to compare data or find consensus about a definition for a sector as comprehensive as the Design domain. In the Dutch Culture Monitor, we speak of the 'ontwerp' sector, which includes the separate sectors of Architecture and Design, but also other creative business services such as communication. This is because some of our larger data providers, such as CBS and the *Monitor Creatieve Industrie*, approach the sector as a whole by defining it within this scope of 'ontwerp'.

[42] The Ministry of Education, Culture and Science uses the term 'creative industry' for the disciplines of architecture, design and digital culture. The Creative Industries Fund NL also refers to 'designing disciplines', while the Council for Culture refers to the same three disciplines as the 'design sector'.

[43] In its most recent recommendations to the design sector, the Council for Culture pointed out the expansion of the design subsectors, as a result of which the traditional tripartite division of graphic design, industrial and product design, and interior and spatial design is becoming increasingly outdated (Council for Culture 2018, 14-15). Statistics Netherlands still mainly uses this tripartite division, while other sources only provide insight into the overarching design sector or combine data on design with data on the visual arts, for example.

[44] The Ministry of Education, Culture and Science uses the term 'creative industry' for the disciplines of architecture, design and digital culture. The Creative Industries Fund NL also refers to 'designing disciplines', while the Council for Culture refers to the same three disciplines as the 'design sector'.

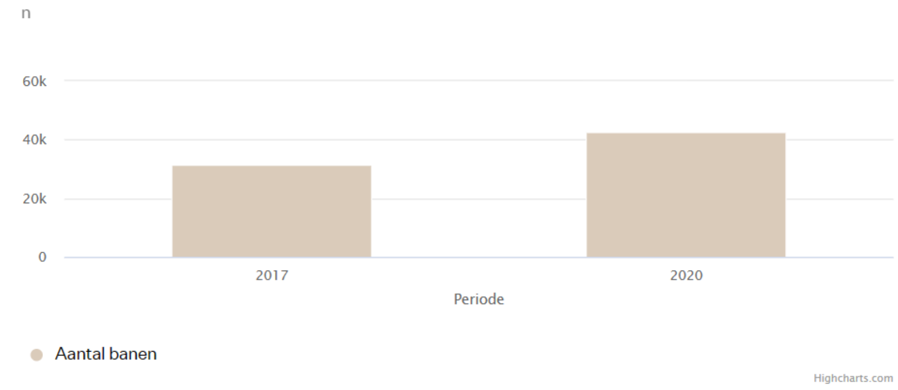

Figure 1. **Job Market. Number of jobs in design as a cultural subsector, 2017-2020**
[Period; Number of jobs]
Source: Statistics Netherlands (CBS) and the Creative Industry Monitor

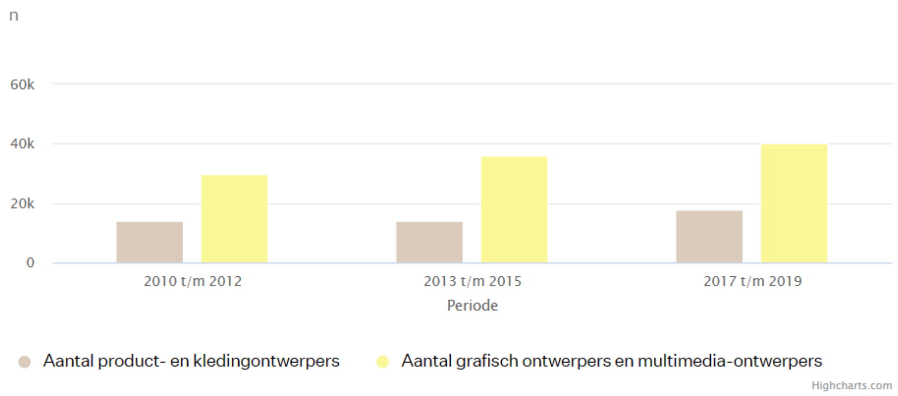

Figure 2. **Number of designers in the job market, 2010-2019**
[Period; Number of product and clothing designers; Number of graphic and multimedia designers]
Source: Statistics Netherlands (CBS) and the Creative Industry Monitor

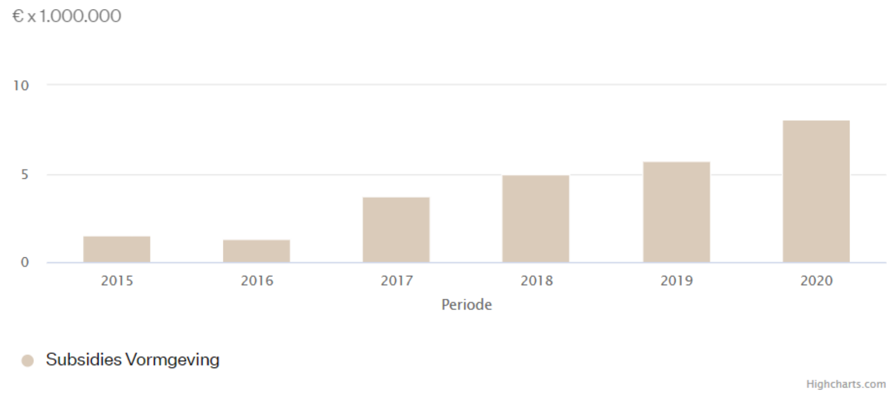

Figure 3. **Creative Industries Fund NL subsidies (1): Design, 2015-2020**
€ x 1,000,000
[Period; Design subsidies]
Source: Creative Industries Fund NL

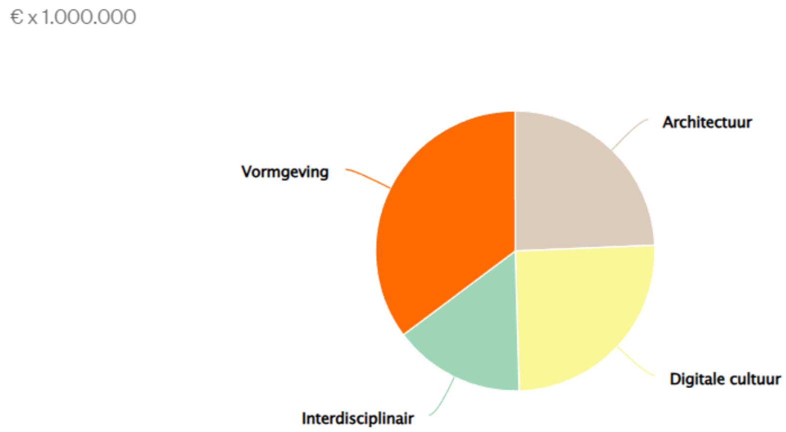

Figure 4. **Creative Industries Fund NL subsidies: Distribution 2020**
€ x 1,000,000
[Design; Architecture; Interdisciplinary; Digital culture]
Source: Creative Industries Fund NL

2. TRENDS AND DEVELOPMENTS

A vibrant and growing job market

One of the main conclusions of the Creative Industry Monitor 2019 was that the biggest increase in job numbers in the creative industry was seen in the design sector. In three years, more than 12,000 jobs were created.

In the Creative Industry Monitor 2021, design is still the fastest growing industry: from 31,300 jobs in 2017 to 42,800 jobs in 2020 (see the figure 'Number of jobs in design as a cultural subsector'). This applies to all jobs within the design industry, from creatives to support staff. However, because design manifests itself both in- and outside the cultural field,[45] it is important to look at available figures across the entire job market.

Statistics Netherlands (CBS), for example, maps out creative professional groups for the broad job market, classifying design among the 'designing professions'[46] (CBS 2021). Regarding design, data is kept here for the two specific professional groups 'product and clothing designers' and 'graphic and multimedia designers'. Like the Creative Industries Monitor, Statistics Netherlands (CBS) reports growth in the design job market. The number of product and clothing designers increased from 14,000 in 2013-2015 to 18,000 in 2017-2019. In the same period, the number of graphic and multimedia designers increased from 36,000 to 40,000 (see the figure 'Number of designers in the job market'). The numbers shown therefore include designers who work outside the cultural sector, for example in business, which paints a broader picture of a growing job market.

Social design

Conscious design, design thinking, new design, design for impact – these are all different ways of interpreting an overarching trend within design: its importance in addressing, solving or researching urgent problems in society. The so-called social design discipline is a concrete example of this. The phenomenon is certainly not new, but there is increasing social support for it (Dijksterhuis 2020a).

What exactly is social design? In practice, the term is interpreted in various ways. Sometimes, social design is used to signify the changing attitude of designers, signalling an increasing awareness of the social and societal environment. Culture journalist Edo Dijksterhuis, for example, writes of the new generation of designers: "They think of the common good and adopt a subservient attitude – the opposite of the star designers of yesteryear with their inflated egos. The new generation prefers social impact over aesthetic temptation" (Dijksterhuis 2020b, 67).

At other times, social design is seen as a concrete sub-discipline within the design field rather than as a way of thinking. Social designers aim to initiate social change with their work, for example by looking at the design of certain social processes. "A social designer not only wants to put things on the agenda or create awareness, but also to really change the world and get people to behave

[45] In the Netherlands, almost 40 per cent of creative professionals work outside the creative industry, and design professions are found, for example, in the trade, industry and healthcare sectors. This is also referred to as 'embedded creativity': creativity that is embedded in sectors outside the creative sector (Rutten et al. 2019, 52-53).

[46] Statistics Netherlands uses the classification artist's professions, other creative professions and other (non-creative) professions, as defined in the International Standard Classification of Occupations (ISCO). Designing professions fall under artist's professions.

differently," says social designer Tabo Goudswaard (Leden 2019, 14). With the Social Design Politie [Police] project, for example, Goudswaard is collaborating with the national police force, linking community police officers to creative professionals. This is a search for other ways of policing, with a positive impact on society as the intended result.

Inclusive design

The growing social awareness among designers is also driving an increasing interest in inclusive design: design that is accessible and usable by everyone. Although diversity and inclusion are a society-wide theme, creative disciplines such as design are expected to make an active contribution to inclusion. After all, the design profession penetrates every aspect of society, according to the design trade organization BNO in its statement on inclusiveness (BNO 2020).

Design is often driven by personal fascinations. As a result, in practice, according to design journalist Jeroen Junte, it is mainly individual designers who actively address inclusiveness or racism and other forms of exclusion with their work. It is also important to give equal space to, for example, designers of colour, those from the LGBTQIA+ community, or those with a disability. It is of decisive importance that they are not only given assignments related to their background, but that they are included in the design field as equal professionals (Junte 2020).

Crossovers and interdisciplinary work

Because designers are increasingly approaching design with a more conscious attitude, the more overarching social processes are also taken into account. This broadens the field of work of designers. As designers often need the knowledge of others to realize their ideas, this increases the importance of external expertise. Crossovers between design and other sectors are therefore taking place more often, as is also apparent from discussions with the design field. Material designers seek contact with biologists, social designers collaborate with anthropologists, and designers – in the broad sense of the word – are increasingly involved in innovation areas such as nanotechnology and the energy transition. Moreover, thinking in terms of disciplines or compartments seems to be a vanishing habit among the young generation of designers, further encouraging interdisciplinary collaborations to emerge.

Designers can also approach a design question from different perspectives and help to find an answer to any contradictions within it. Researcher Nynke Tromp explains that contemporary designers therefore have a crucial role to play in tackling complex social issues, such as the impact of our consumption patterns on climate change. In a versatile team, according to Tromp, it is the designer who holds the key to interdisciplinary thinking (Tromp 2015).

Richard van der Laken, creative director of What Design Can Do, emphasizes, just like Tromp, that designers in particular can put their qualities to good use in solutions to, for example, the climate problem. "Designers can bring about a system change by devising practical solutions to make the entire production chain more sustainable," he says. The Clean Energy Challenge in 2018 is mentioned as an example of interdisciplinary collaboration. Designers, architects and technicians have developed, for example, "artistic solar panels that can cover an entire building, marbled building blocks made from recycled plastic and attractively designed lamps that obtain energy from plants" (Meulen 2021, 20).

Sustainability
As already mentioned, sustainability is an important theme within the design sector. It is not for nothing that sustainability was central at the Dutch 2019 Design Awards and Milan Design Week (Junte 2019a and 2019b), among other events. And the most discussed Dutch design for sustainability is probably The Ocean Cleanup by inventor Boyan Slat. Nowadays, a truly sustainable design is not just about the material used, but the entire chain behind the creation of a design. Sustainability and the aforementioned trend of crossovers and interdisciplinary working are therefore inextricably linked.

The fact that the idea of sustainability is widespread in the design sector is also reflected in various other developments. Designers are increasingly experimenting with new, organic materials (such as mycelium or banana leather) and are on board with the global pursuit of reuse and circularity. For example, Fashion for Good – whose innovation platform aims to make the fashion ecosystem more sustainable – brings together many such innovators in the field of raw materials and recycling for new collaborations in the fashion industry.

Designers once again showed a strong sense of urgency in Dutch Design Week 2022, with its central theme *Get Set... We're on a mission!* Concrete actions, solutions and meaningful collaborations for all kinds of problems facing our society were central to Dutch Design Week that year, with the underlying idea that we can create a better (and more sustainable) future together (DDW 2022).

3. WHAT ELSE WOULD WE LIKE TO KNOW ABOUT THE DOMAIN OF DESIGN?

The versatility and limitlessness of design make it an extraordinarily dynamic domain, which inevitably complicates the monitoring of data within the Culture Monitor. For example, the current figures on the job market – from the Creative Industries Monitor and Statistics Netherlands (CBS) – are incompatible due to their different scope and data categories. To be able to paint a conclusive picture of the job market in the design sector, for example, unequivocal figures would be needed, which also extend to the other sectors in which design is active, such as trade, industry and healthcare. It would also be valuable to map out the impact of the pandemic on the design sector, as soon as relevant figures are available.

The discussions held also show that the infrastructure for the design field is deficient in certain aspects: there are few exhibition venues or institutions for design, and there is insufficient connection between clients and designers. The aim for future updates is therefore to provide more (numerical) insight into this infrastructure, so that the weak points within the field become visible.

4. WOULD YOU LIKE TO KNOW MORE ABOUT THE DESIGN DOMAIN?

View more data about the Design domain in the Culture Monitor dashboard.

More literature on the domain of Design can also be found in the knowledge base of the Boekman Foundation.

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6. DISCUSSION PARTNERS

In 2021 we spoke to the following people when gathering information for the development of this domain page:

- Annemartine van Kesteren (design curator, Museum Boijmans van Beuningen)
- Jorn Konijn (head of programme, Dutch Design Week)
- Madeleine van Lennep (director, BNO)
- Gitta Luiten (culture & heritage partner, BMC)
- Olle Lundin (producer, curator and designer, including the Nieuwe Instituut)
- Ellen Rass (head of funding, Dutch Design Foundation)
- Eva Roolker (design coordinator, Creative Industries Fund NL)

DOMAIN: GAMES

On the Games domain page, we discuss developments in the production, distribution, and consumption of digital games, as well as the surrounding infrastructure. Since the game industry is inherently international, both Dutch and international data and insights are used for this purpose. The Games domain currently only includes video games. Other forms of digital culture and games will be added to the Culture Monitor in the future.

Written by Bjorn Schrijen
Latest update 15 December 2022

INDIGO 2018 / Photo via: Dutch Game Garden

SUMMARY

Each year, the Games domain continues to grow with impressive figures. The number of game developers is rapidly increasing, as are the number of players and revenue within the industry. The coronavirus pandemic has generally boosted this growth (providing a popular alternative to meeting friends in person and attending live events). In addition to its economic value, the cultural recognition of games is also increasing. This perpetuates crossovers with other cultural domains.

However, the industry also faces challenges. For example, Dutch developers have fewer subsidy options compared to their foreign counterparts. More efforts are needed to preserve (Dutch) games as cultural heritage. The growing number of video games makes it more difficult to stand out with a new game. And there is still a long way to go in terms of diversity, although a positive development is that more and more people and organizations are making efforts on that front.

1. INTRODUCTION AND KEY FIGURES

During the most recent edition of the annual INDIGO event, several Dutch game developers showcased their newest games. A look at the selection shows the great diversity of experiences that video games have to offer, from games that deal with mental health or let players help to search for a cancer vaccine, to games starring a heavily armed axolotl or a mail-delivering gnome. There are games about theatre, music, or literature; reflective puzzle games and chaotic multiplayer games; and games that bring the past to life or let you shape the world of tomorrow.

All these games originate from a nascent industry[47] that counts approximately 4,560 workers and 630 companies in the Netherlands (Dutch Game Garden 2022). These are mainly relatively small companies – the Netherlands has few really large game studios.[48] Most companies are involved in the development of new games, often making a distinction between *applied* (or serious) *games* and *entertainment games. Applied games* are usually developed for a client and are used in education, healthcare, for training purposes, marketing, or raising awareness. In 2018, approximately one-third of all game developers in the Netherlands exclusively made *applied games* – internationally speaking, the Netherlands therefore has many developers of these types of games. The remaining developers focus mainly on *entertainment games*[49] for consumers (Grinsven et al. 2019). These games are played on computers (PC games), smartphones and tablets (mobile games), and special game consoles such as the Nintendo Switch, Xbox, or PlayStation (console games).

Since games from Dutch developers appear in many places, it is difficult to measure how many games they produce per year. This is also methodologically difficult. For example, game creators regularly develop updates for existing titles or release these titles for newer systems. Simply reviewing new titles doesn't provide an accurate measure of overall productivity. In order to gain a bit more insight into this, the Dutch Game Industry

[47] The first Dutch games appeared around 1980. For an overview of Dutch gaming history, see for example, Lenting 2019, or the Dutch Games Canon (Nederlandse Games Canon).
[48] The most famous exception is the Amsterdam-based Guerilla Games. The latest game from this studio – Horizon Forbidden West – was released in February 2022 and was described in the media as the most expensive Dutch media production ever made.
[49] These types of games are much broader than the term might suggest. While most focus on entertainment, they can offer a much wider variety of experiences. For example, more and more makers are using the possibilities of the medium to tell personal stories or explore societal themes.

Directory, from game developer Adriaan de Jongh, was expanded in mid-2021, adding the possibility to derive statistics from it (Otterlo 2021b). Developers can add their own games to this database and have been invited to do so on a regular basis since the update. Currently, the database is not yet complete and *applied games* in particular are under-represented, but the hope is that the directory will increase its accuracy in the future. According to current statistics, 34 new Dutch games appeared in 2019, 21 in 2020 and 16 in 2021.

Dutch game industry

The following figures show the number of companies, jobs, and the estimated turnover of the Dutch video game industry. The graph on turnover shows the lower and upper limits of the estimate: in 2021, the turnover was between 420 and 440 million euros. For a more detailed breakdown of these figures, see the *Games Monitor* by Dutch Game Garden. You can switch between the different graphs using the tabs above the figure.

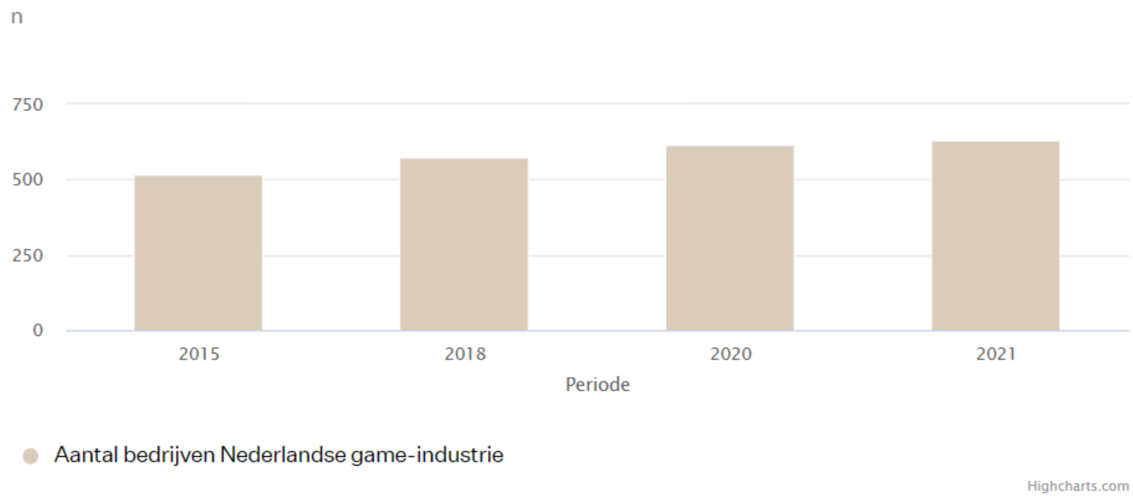

Figure 1. **Number of companies in the Dutch game industry, 2015-2021**
Source: *Games Monitor*

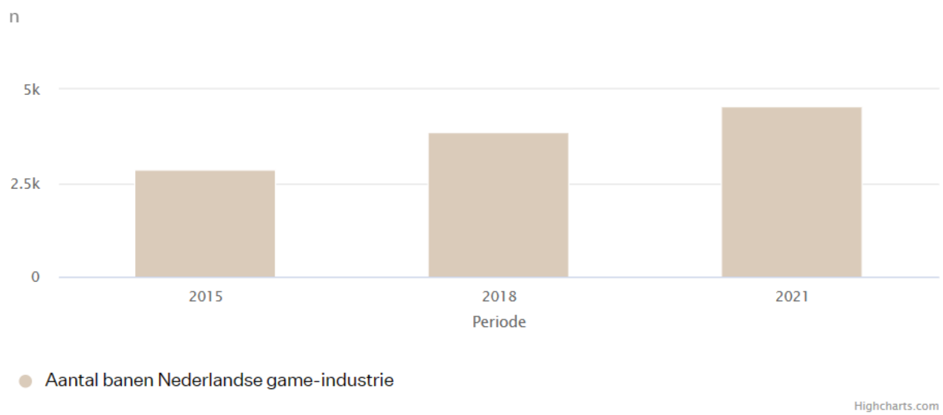

Figure 2. **Number of jobs in the Dutch game industry, 2015-2021**
Source: *Games Monitor*

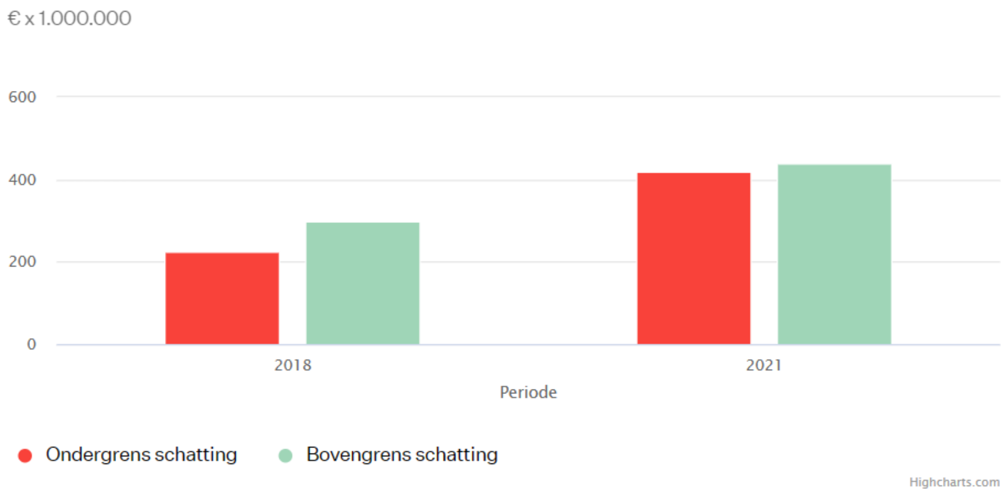

Figure 3. **Turnover of the Dutch game industry, 2018-2021**
[Period; Lower-limit estimation; Upper-limit estimation]
Source: *Games Monitor*

In 2018, anyone wanting to become active in the Dutch video game industry could choose from 32 study programmes focused entirely on games. About 900 students graduated from these programmes that year (Grinsven et al. 2019). In 2021, there were approximately 700 graduates (Dutch Game Garden 2022). These seem like high numbers relative to the number of people working, but trained game developers can also use their skills in many other fields. Some graduates also move abroad to work.

Dutch game developers make their games for a worldwide audience, which has been growing in size for years. In 2021, it is estimated that almost 3 billion people played video games, with the game industry realizing a turnover of 192.7 billion dollars (McDonald 2022). 52 per cent of the European population between the ages of 6 and 64 years play games (VGFN 2022). In the Netherlands, 7.4 to 7.6 million people played games in 2019, spending an average of 61 minutes per day and approximately one billion euros in total. In 2022, 39 per cent of the Dutch population owned a game console (Grinsven et al. 2019, Multiscope 2020, Uffelen et al. 2021, RTL Nieuws 2022). In addition to playing, watching others play games – as a streamer, influencer or e-athlete[50] – is also becoming increasingly popular. In 2021, 490 million people worldwide watched e-sports and 810 million watched live streams of gamers (Tristão 2022, Chiovato 2022).

Turnover and player numbers in the global game industry

Partly due to the pandemic, the turnover of the global game industry rose sharply in 2020 and 2021. Market researcher Newzoo expects this strong increase to be followed by a small decrease in 2022, followed by further growth from 2023.

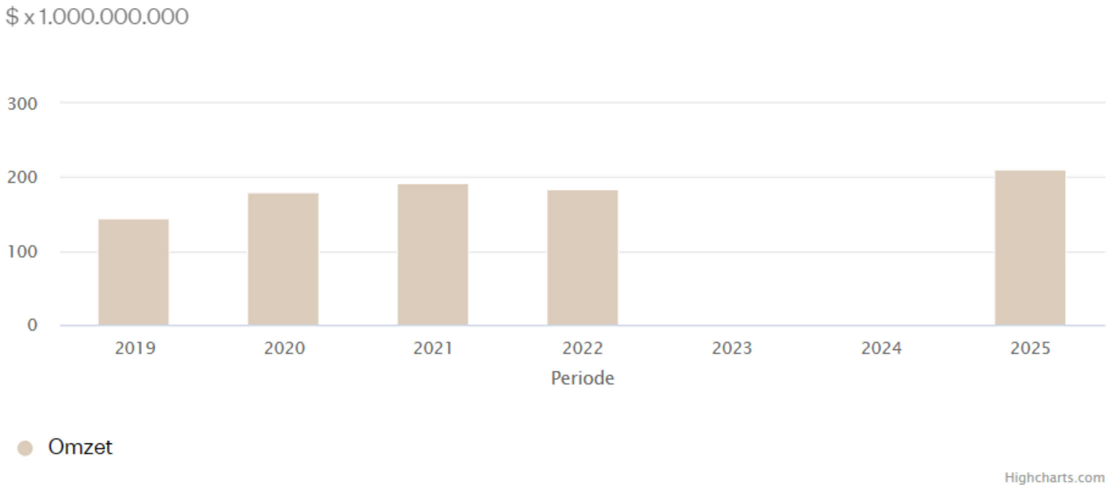

Figure 1. **Realized and projected turnover of the global game industry between 2019 and 2025**
[Period; Turnover]
Source: McDonald 2022, Newzoo 2021b, Newzoo 2022a

[50] Streamers and influencers often show themselves playing a game, while giving tips or comments, for example. E-athletes play games – often as professionals – in a competitive context.

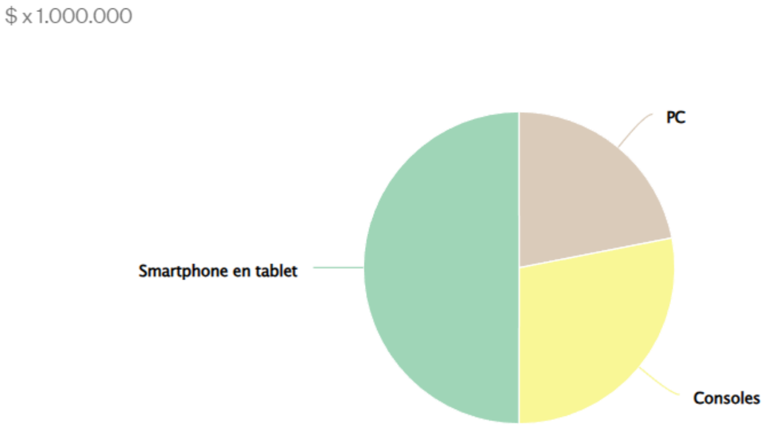

Figure 2. **Projected turnover of the global game industry in 2022, by segment**
[Smartphone and tablet; PC; Consoles]
Source: McDonald 2022, Newzoo 2021b, Newzoo 2022a

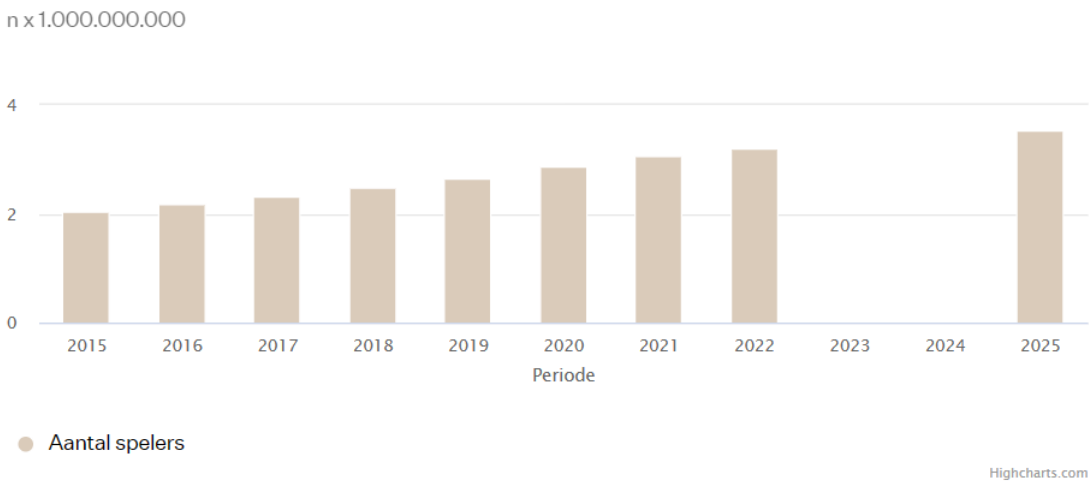

Figure 3. **Realized and projected growth of players globally between 2015 and 2025**
[Period; Players]
Source: McDonald 2022, Newzoo 2021b, Newzoo 2022a

2. TRENDS AND DEVELOPMENTS

Games as culture, games as heritage

Games currently play a very small role in national[51] cultural policy – something that the industry pointed out in 2020, with other concerns, in the media and in a pamphlet for the House of Representatives (Sala et al. 2020, Maessen 2020; see also Schavemaker 2022). The subsidy options for game developers are also quite limited in the Netherlands. They mainly[52] rely on the Creative Industries Fund NL, in particular the Digital Culture scheme. In the 2019-2021 period, the fund provided an annual subsidy of around 300,000 to 350,000 euros for game projects (Otterlo 2021a, 2022b). This is considerably less than the amounts that neighbouring countries[53] invest in their national game industries.

Although the role of games in cultural policy is small, their role as a cultural medium is on the rise. Games combine cultural forms such as film, literature, music, architecture, design and visual arts. But their interactive possibilities make games more than the sum of their parts. To illustrate, games make it possible to explore digital worlds with complete freedom, or to help shape them as a co-creator, and to put the player directly in the skin of the main character, making them responsible for their choices and consequences thereof. Games provide unique, personal and immersive experiences. Where other media tends to *tell* stories, games are able to let the player actually *experience*[54] them. Increasingly, these are the personal stories of developers, or stories that touch on important social themes.

In addition, games are more often becoming part of other cultural domains. There are numerous examples of this. For example, filmmakers use game technology and are increasingly making films and series based on games, the opening ceremony of the Olympic Games in Tokyo consisted largely of video game music, the Reading Coalition (Leescoalatie) is a literacy promotion project based on game stories, and in the autumn of 2021 Museum Belvédère organized a game art exhibition (Gestel 2020, Harty 2022, McWhertor 2020, Library Network 2021,

[51] In contrast, the European Parliament passed legislation in November 2022 that – among other things – called for improvements, more investment and a long-term strategy for the European games industry (Dealessandri 2022b, Rousseau 2022).

[52] In addition, there are European subsidies that Dutch developers could benefit from, such as the Creative Europe scheme (video games and immersive content development), which reopened in 2023. The Creative Industries Fund NL and the Flanders Audiovisual Fund (VAF) also announced a collaboration in June 2022, aimed at (financially) supporting Dutch-Flemish co-productions (Otterlo 2022g).

[53] Flanders: In the period 2019-2021, the VAF/Game Fund provided approximately 1.5 to 1.7 million euros in subsidies annually – although part of this support must be repaid (Vlaams Audiovisueel Fonds 2020, Otterlo 2022c). In 2022, the available budget looks to be increased to 2.9 million euros and from 2023 structurally to 2.7 million euros (Otterlo 2022f). Work is also underway on a tax shelter as of 1 January 2023, which will make it tax-efficient to invest in Belgian video games (Legrand et al. 2022).

United Kingdom: Developers can get a tax break on their development costs – in 2020/2021 this benefit totaled 180 million pounds (Rousseau 2021). The UK Games Fund has also distributed 5.7 million pounds in grants to 170 projects since 2015 and received a new budget of 8 million pounds in 2022 (Partis 2022).

France: As in the United Kingdom, developers can claim tax benefits. Since 2017, French developers have received 220 million euros in support with this. This scheme was recently extended until the end of 2028 (Dealessandri 2022a). In addition, a subsidy is provided by the Centre national du cinéma et de l'image animée (National Centre for Cinema and Film) within the Fonds d'aide au jeu vidéo (Games Aid Fund). In 2019, 3.5 million euros was made available for 59 projects (CNC 2020).

Denmark: In the period 2018-2021, the Danske Filminstitut (Danish Film Institute) granted approximately 1.8 to 2 million euros annually in development, production, and distribution subsidies (Danish Film Institute 2019, 2020, 2021, 2022).

Germany: Since 2020, the federal government allocates 50 million euros per year to support national games and to strengthen the international competitive position of the German game industry. In 2023, this amount will be increased to 70 million euros. In addition, there are various federal states with subsidy options (Game 2021, 2022).

[54] For an example of further elaboration on this concept, see Schrijen 2018 and Soetewey 2022.

Museum Belvédère 2021). A broader development is that (larger) games are transforming into (social) platforms[55] that also offer space for activities other than gameplaying. There are also cultural activities, such as a digital concert or a tour of a virtually simulated museum (Carpenter 2020, Vergauwen 2021).

If games are seen as culture, it is also important to safeguard them as cultural heritage. This is also an urgent theme since games as heritage are highly vulnerable.[56] There are currently several private collections[57] in the Netherlands, and Dutch games are collected by The Netherlands Institute for Sound & Vision (Beeld & Geluid).[58] To intensify these efforts, it is important on the one hand that there is a legal mandate[59] for the archiving of games and that there is sufficient budget for this, and on the other hand that the industry also takes care of its own history and donates games to archives.

(Too?) many new games?

As in the film and music industries, the distribution of games has undergone a complete transformation in the past decade. Whereas ten years ago the majority of games were still sold in physical formats such as DVD and Blu-ray, most games are now downloaded or streamed via digital stores. In 2021, 93 per cent of global video game sales came from digital distribution (Batchelor 2021).

Physical and digital distribution

Digital distribution now accounts for 93 per cent of global game sales. Games on physical carriers are still mainly sold for game consoles, such as the Nintendo Switch, PlayStation and Xbox. Games for smartphones and tablets are only distributed digitally.

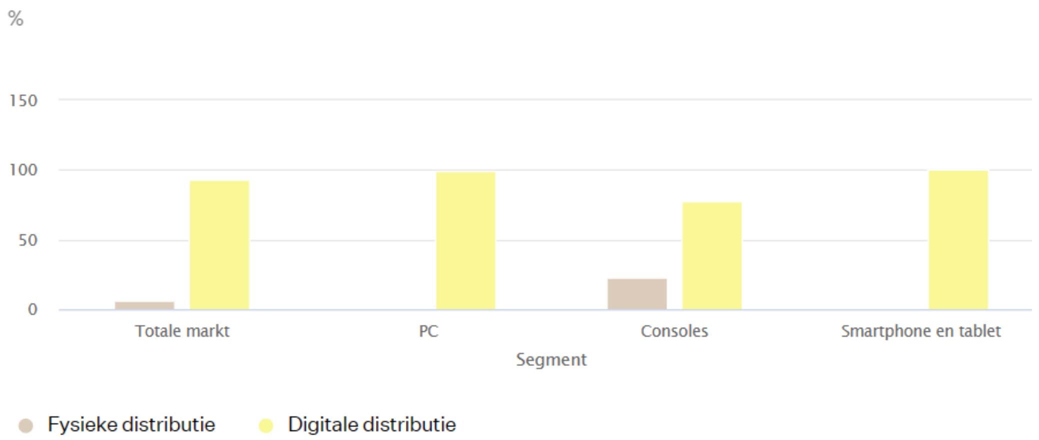

Figure 1. **Distribution of global game turnover 2021, by physical and digital distribution**
Segment [Total market; PC; Consoles; Smartphone and tablet]. Physical distribution – Digital distribution.
Source: GamesIndustry.biz

[55] This is also referred to as the metaverse (Newzoo, 2021b).
[56] Older games often no longer work with modern systems, and physical CD-ROMs and cassettes may become unreadable due to bit rot in the near future (Lowood et al. 2009). Modern games that only appear digitally can be removed from digital stores overnight – if these stores have not already disappeared completely (Hayton 2021).
[57] Examples are the Bonami Games & Computers Museum in Zwolle, the National Videogame Museum in Zoetermeer, the HomeComputerMuseum in Helmond, and the National Archive of Educational Games (Nationaal Archief Educatieve Games), launched in 2021.
[58] At the end of November 2022, Sound and Vision had 170 Dutch games in its collection. See also Berendse 2020 on the collection of games by Sound and Vision (Beeld en Geluid).
[59] In addition, an answer must be found to many practical problems surrounding the archiving of games. For example, the copyrights surrounding games are complex, and existing metadata is often insufficient to describe games.

The impact of this change can hardly be underestimated since digital distribution has led to a strong broadening of the game landscape. It has opened the market for small studios – so-called *indies*[60] – to reach a global audience through digital stores independently of publishers. These developers have also found more space for innovation, artistic experimentation and smaller-scale experiences than games previously offered. At the same time, more and more programmes and tools for developing games have become available, making this possible for a growing number of developers.

This democratization of distribution and production has greatly contributed to the development of games into an artistic medium which also allows developers to tell personal stories. An important downside, however, is that oversupply is imminent. For example, more than 10,000 new games appeared on Steam – one of the largest digital stores for PC games – in 2021 (SteamSpy n.d.). In the last quarter of 2021, the mobile Google Play Store even contained nearly 250,000 more games than a year earlier – although in the first quarter of 2022 Google did remove more than 200,000 games that weren't being updated (Clement 2022). Moreover, new games don't just compete with other new games. Some games remain popular for years,[61] possibly because the developer continues to add content for years after release.

Increase in the number of new games

The number of new games released each year is increasing rapidly, as illustrated by figures from Steam (one of the largest digital stores for PC games) and the Google Play Store (one of the largest platforms for mobile games). The decrease in the number of games available in the Google Play Store in 2018 was caused by new regulations that some games did not comply with.

As a result, it's becoming more difficult for new games to stand out. Therefore, developers have to invest more in marketing, collaboration with publishers is increasingly important, and frequent and large discounts have become the norm rather than the exception. This increased competition is partly compensated by growing demand, but this is nevertheless mentioned as an important challenge by discussion partners in the Dutch video game industry.

[60] For an additional overview of the rise of indie games, see Wikipedia 2022a.
[61] To illustrate: of the 100 games that generated the highest gross sales on Steam in 2021, only 27 of these were also released in 2021 (Steam, 2022).

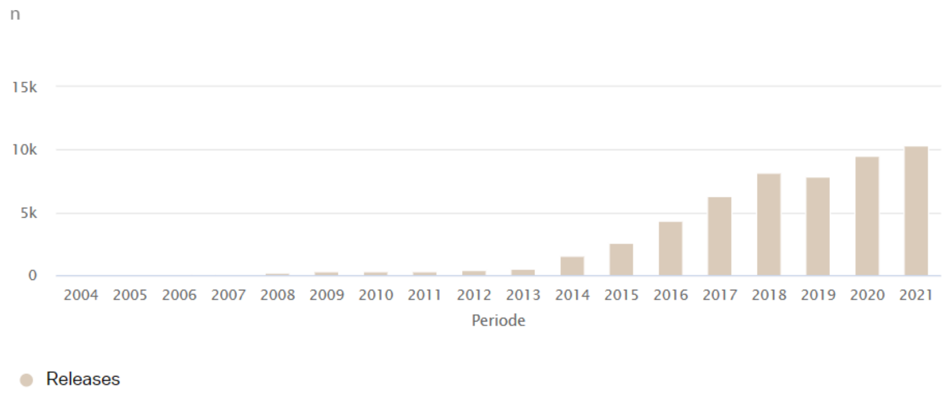

Figure 1. **Number of newly released games on Steam per year between 2004 and 2021**
[Period; Releases]
Source: SteamSpy and Statista

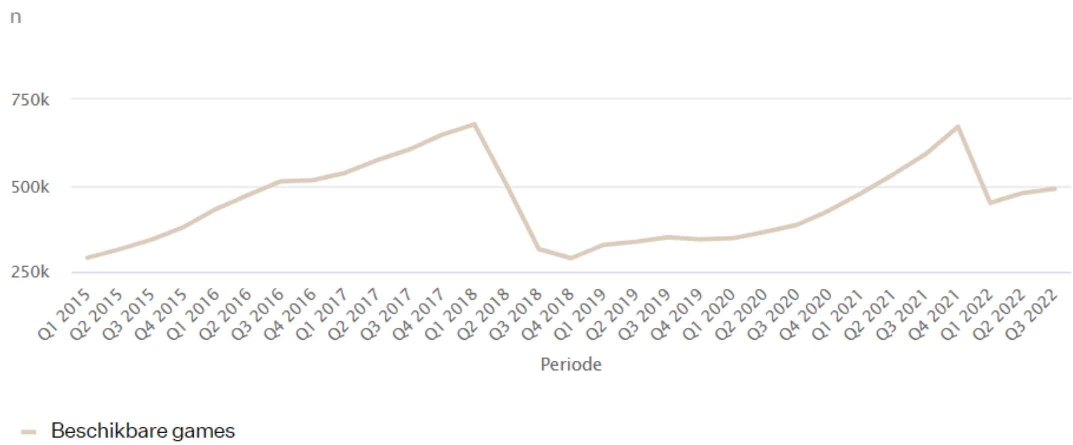

Figure 2.**Number of newly released games in the Google Play Store per quarter between 2015 and 2022**
[Period; Available games]
Source: SteamSpy and Statista

Changing profit models

With the democratization of game development, an increased number of individuals and companies aim to make money from creating games, and the ever-increasing demand translates to great income opportunity. At the same time, *the way* in which that money is earned is also changing, resulting in new profit and financing models.[62]

So-called microtransactions in games that can often be played for free have been established as common practice for some time. These can be cosmetic upgrades such as a special outfit or skin, but also bonuses that give the player an in-game advantage. A type of microtransaction that has received much media attention is the *loot box*. Often the player pays with real money for these digital grab bags, without knowing whether they will get anything of value.[63] These gambling elements can certainly be addictive and harmful for young people (see, for example, Murray 2022). The Netherlands and Belgium are therefore among the first countries in the world taking active action against loot boxes.[64]

Another type of transaction that received a lot of attention, especially in the wake of 2022, is the *non-fungible token* (NFT). NFTs are unique proofs of ownership of digital objects, which are recorded on the blockchain[65] and can be traded for (sometimes a lot) of (crypto) money. For example, in a game, a player with an NFT could become the sole owner of a special weapon, which they could then resell. However, opinions on the use of NFTs vary widely.[66]

A third development is the emergence of subscription services for games and *games as a service*. With subscription services, a user pays a fixed amount per month for access to a large selection of games (Wijman 2019). In 2020, an international survey found that 35 per cent of respondents used at least one subscription service (Jaeger et al. 2020b); the share of such subscription services in the total turnover of the game industry was approximately 4 per cent.[67] Games as a service is also a model that is on the rise, especially with large blockbuster games. A game will receive new updates – with high frequency long after its release – which a player can purchase individually or in the form of a subscription (Zaets 2020).

[62] For overviews of different revenue models and the extent to which they are used, see for example, Clement 2021a, Perrotta 2020, and Wikipedia 2022b.

[63] For example, a loot box in a football game may include Lionel Messi, but it could also include a third reserve goalkeeper from the second division.

[64] In the Netherlands, loot boxes without a license are prohibited if the item the player can win with them can be traded and has an economic value. In 2019, the Netherlands Gambling Authority (Kansspelautoriteit), therefore imposed a penalty on the developers of the popular football game FIFA, since, according to the Netherlands Gambling Authority, they violated the law on betting games with their loot boxes. Although the court ruled in favour of the Netherlands Gambling Authority, in 2020, the Council of State ruled in 2022 that this penalty was unjustified, since according to the Council, the loot boxes in FIFA were wrongly regarded as a separate game (Kansspelautoriteit 2018, Kansspelautoriteit n.d., Otto 2022). In the summer of 2022, the House of Representatives passed a motion asking the government to investigate a ban on loot boxes (Bright 2022). In Belgium, paid loot boxes are simply prohibited (Arkel 2019).

[65] The blockchain is a sort of database in which transactions are stored. Each transaction is added as an encrypted 'block' of information to a 'chain', which also contains information about previous transactions. This creates a 'long, unchangeable and uncrackable chain of information'. An important difference with other databases is that the blockchain is decentralized: the blockchain is not on one server and is not managed by one organization, but runs in a large network of computers. A new block of information is not added to the blockchain until all computers in the network approve the transaction. See also a more detailed explanation by the Dutch Consumers' Association.

[66] Proponents point to the possibility that players can earn from their achievements or creations in a game (play to earn), the (future) possibility of using digital assets in multiple games, and to the decentralized and democratic nature of the technology. Opponents point out, among other things, that NFTs are financial products or investment objects that do not belong in games (especially for children), that there is no regulation, that blockchain technology consumes a lot of energy and therefore has a highly negative environmental impact, and that NFTs become worthless if a game's server closes (Ammelrooy 2022, Duursma n.d., GDC 2022). See also a recent series of articles by trade magazine *Control* in which developers from the Dutch game industry discuss the advantages and disadvantages of NFTs in games.

[67] The subscription service revenue was 6.6 billion dollars in 2020; the total revenue of the gaming industry 179.1 billion dollars (Clement 2021, McDonald 2022).

A recent consequence of the emergence of these revenue models is an almost unprecedented wave of acquisitions, whereby publishers and game studios are taken over by big(ger) companies. In January 2022 alone, three major acquisitions worth 85 billion dollars were announced – more than was spent on acquisitions in all of 2021. One of the reasons for this is so that companies can acquire content for their subscription services:[68] the more studios (and licenses owned by these studios) are part of your company, the more games you can add (whether or not exclusively) to your own subscription service. In addition, specific expertise is purchased through acquisitions, such as in the field of games as a service (Elliot 2022, Maessen 2022a, see also Maessen 2022b).

These trends concern the global video game industry, but developers in the Netherlands are also thinking about new market models. A first interesting trend is visible among developers of *applied games*. Traditionally, these games are developed for a client, after which the revenue consists of the amount that this client pays for it. However, there is an increasing number of examples of applied games being developed as stand-alone products and can be sold in several places, so that a sustainable revenue model can be created around them.

A second recent development – not so much in revenue models as in financing models – is the establishment of the Midgame Fund in March 2021 by Dutch game developers. Developing a game often takes years of work, which means that substantial investments must first be made before the investments can be recouped. In the Netherlands, however, there are few domestic investors or government subsidies that can help with this. With the Midgame Fund, 35 investors try to close this gap in pre-financing with investments of up to 150,000 euros in exchange for a limited part of the turnover, which the fund can then reinvest in new games. In the first nine months, the fund invested 300,000 euros in three games (Otterlo 2021d).

Impact of the pandemic

During the coronavirus pandemic, many people turned to games. Worldwide, the turnover of the game industry increased sharply between 2019 and 2021 from 144.4 to 192.7 billion dollars, although a one-off and corrective decrease to 184.4 billion dollars is expected for 2022 (Newzoo 2021a, Wijman 2022). The Dutch industry also experienced growth over the last few years: turnover increased from 225 to 300 million euros in 2018 to 420 to 440 million euros in 2021 (Grinsven et al. 2019, Dutch Game Garden 2022). Dutch consumers spent 42 per cent more on games in May and June 2020 than a year earlier, and consumer spending increased by 20 per cent over the year as a whole (Jaeger et al. 2020a, Schipper 2020, Uffelen 2020). Social games played online with friends performed particularly well: in a time when physical contact was impossible, they still offered the opportunity to experience things together (Jaeger et al. 2020a).

Yet the consequences of the coronavirus crisis were not exclusively positive. Although approximately two-thirds of game developers in the Netherlands and internationally did not experience any negative consequences for productivity and creativity, many projects were delayed – sometimes also due to disruptions elsewhere in the chain (GDC 2021, Dutch Game Garden 2021). As a result, many

[68] See also the report for the Audio-Visual domain, in which the rise of streaming subscriptions has created a similar need for new content.

major and long-awaited titles were postponed, even into 2022 (Gach 2022).

The impact differs greatly per organization, however: while some Dutch companies benefited from the increased demand for games, others suffered financial damage (Dutch Game Garden 2021, Otterlo 2020). The negative impact was experienced mainly by developers of applied games, since they are often dependent on clients. Due to the (economic) uncertainty and full attention to the fight against the coronavirus, many assignments were postponed or cancelled at the beginning of 2020. What's more, there were far fewer physical events where developers could meet new clients (Dutch Game Garden 2021, Dutch Games Association 2020).

Progress in diversity, equity and inclusion

For a long time,[69] games were mainly marketed as something for boys and men. At the moment, 72 per cent of women play games worldwide and almost half of all players are women, but unfortunately this stereotype has by no means disappeared[70] (Tue Le Gnoc 2022a, 2022b, VGFN 2022).

The consequences of this image are apparent in many ways. First of all, the game industry mainly employs men. In the Netherlands in 2018, only 19 per cent of those working in the game industry were women – internationally this was 20 per cent in 2021 (Grinsven et al. 2018, GDC 2022). These ratios contribute to the widespread occurrence of sexual harassment and transgressive behaviour, which has become known in recent years, especially among large foreign companies (Hermus 2021b, Otterlo 2021c). Little is known about transgressive behaviour in the Dutch game industry, although responses from Dutch professionals show that they too have encountered or experienced examples of this during their career.

Sexism is also a problem in games themselves. This is first and foremost reflected in the way in which women are represented in games. Of 27,000 recently surveyed video game characters, only 20.1 per cent were female – and these women are also much more likely to appear in revealing clothing or (partially) nude than male characters (Geena Davis Institute on Gender in Media et al. 2021). Secondly, women and girls who play online games often encounter sexist behaviour and harassment – also outside the games (Putten et al. 2021).

However, gender is not the only form of diversity in which the gaming industry can improve on. For example, the aforementioned research shows that characters of colour are also in the minority (and are more often used as a stereotype), and that characters from the LGBTQIA+ community, with a disability, from an older age group or who are overweight hardly occur (Geena Davis Institute on Gender in Media et al. 2021). Less is known about the representation of these groups among developers, although research among more than 1,100 (mainly American) developers showed that there are considerably fewer people of colour among them than among the entire American population relatively speaking. In contrast, the number of

[69] This has a background in the 'video game crash' of the 1980s, when worldwide game sales collapsed – in America, sales fell by no less than 97 per cent in two years. As a result, developers in the years that followed focused their marketing activities much more emphatically on the most promising target groups. Market research showed that although men and women played games, men were in the majority. Where games often used to be gender-neutral, in the years that followed games were increasingly made and promoted as something for men and boys, so that this increasingly became the stereotypical image people have of video games (Lien 2013).

[70] This is perhaps evidenced by the fact that RTL News made another news item in August 2021 about the fact that women also played games (RTL News 2021). In addition, although approximately the same number of men and women play games, women see themselves as gamers much less often than men (Tue Le Gnoc 2022b).

developers from the LGBTQIA+ community and developers with disabilities was slightly above average (IGDA 2019).

Diversity of characters in video games

In 2021, 27,564 video game characters were analysed across 684 gameplay videos. This included looking at gender, skin colour, sexual orientation, age, limitations, and body size. The results clearly show that male, white, heterosexual, young, healthy and thin characters are still the most common in video games.

Although the game industry has a long way to go in terms of diversity, more and more people are embarking on that path – market researcher Newzoo named the increasing focus on diversity and inclusiveness as one of the five most important trends in 2021 (Wijman 2020). There are now many initiatives and organizations[71] that are working on this, such as Women in Games, AbleGamers or the Dutch Games [4Diversity] and HiPerks. Their work contributes to the increasing attention to diversity and inclusion at events, in the media, and also in games themselves. Characters from minority groups are still not sufficiently represented, but there is an increase in games with more inclusive characters or the possibility for players to design characters themselves (Hermus 2021a, Havermans 2020, Maessen 2020). Games are also increasingly offering features[72] that make their games more accessible to players with disabilities (Wijman 2020). The number of developers who say they are working on diversity and inclusion also increased (slightly) to 60 per cent in 2021 (GDC 2021).

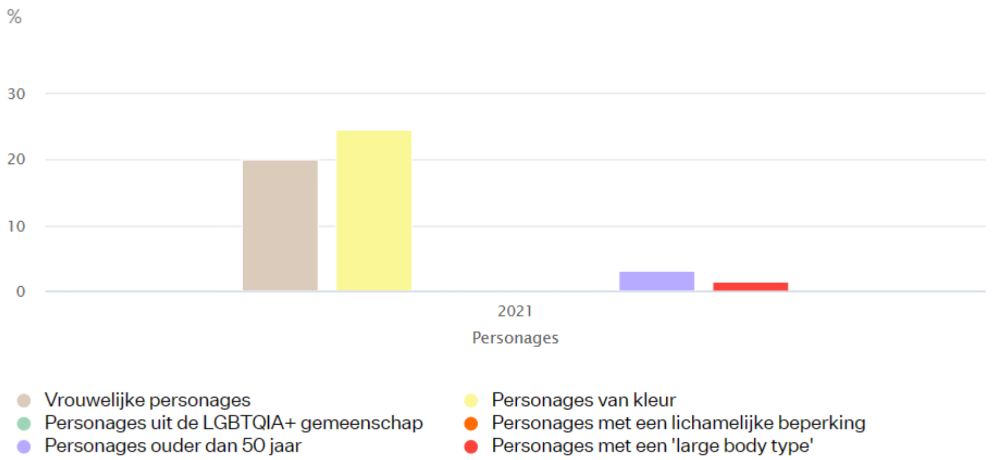

Figure 1. **Diversity of characters in video games**
Characters [Female characters; LGBTQIA+ community characters; Characters above the age of 50; Characters of colour; Characters with disabilities; Characters with 'larger body types']
Source: Geena Davis Institute on Gender in Media

[71] See also the overview of organizations under Tue Le Gnoc 2022a.

[72] Examples include adjustments for people who are colour blind, adjustable controls and levels of difficulty, audio descriptions for the deaf and hard of hearing, fonts that are easier to read for players with dyslexia, and settings for players who get sick or dizzy from the movements in games (GDC 2022).

Diversity among video game developers
When asked to what extent developers worldwide focus on diversity and inclusion, 60 per cent answered at least “a moderate amount” in 2021. In 2020, this applied to 56 per cent of developers.

There are important opportunities in attracting a more diverse workforce. It goes without saying that striving for diversity in application procedures and offering an inclusive company culture is important, but there are also many opportunities beyond that. For example, during study information sessions or open days, developers could actively inform and enthuse people from minority groups about a career in the game industry. Young developers from these groups can also be helped with things such as building a portfolio. Work experience placements – possibly supported by the government – could also contribute to this.

The game industry still has a long way to go in terms of diversity and inclusion, but it has a world to gain. More than any other media, games offer the opportunity to get under the skin of a character, to become someone else for a short time and to understand that person better. The more diverse those characters are, the greater the diversity of perspectives players can explore in a game. In that sense, diversity in the game industry can also make an important contribution to inclusiveness in society (Schrijen 2018, Hermus 2021a).

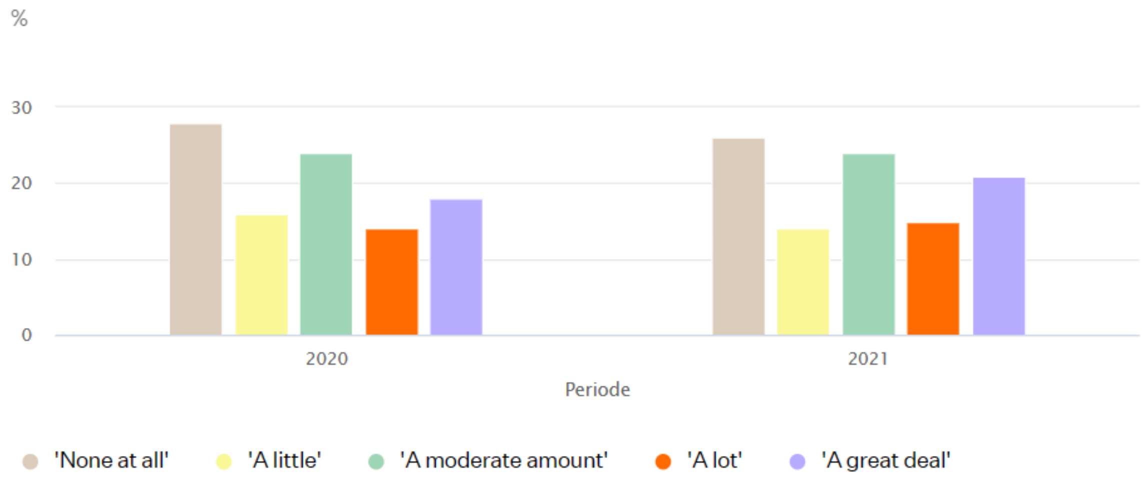

Figure 1. **Extent to which developers worldwide focus on diversity and inclusion**
[Period]
Source: Game Developers Conference

3. WHAT ELSE WOULD WE LIKE TO KNOW ABOUT THE GAMES DOMAIN?

Although diversity and inclusion are important themes in both the general cultural sector and the game industry, we still know relatively little about diversity in the Dutch game industry – regardless of gender distribution. Measuring it is complex,[73] however this would benefit the sector by monitoring and possibly shaping policy around it.

A second need mentioned by discussion partners from the Dutch industry is more insight into Dutch players. Who are they? Which games do they mainly play, and how often do they play Dutch games? To gain a little more insight into this, questions about playing games will be added in the next edition of the VrijeTijdsOmnibus (Leisure Omnibus). This biennial leisure time activity survey is issued by the Dutch government (via the CBS) in collaboration with the Boekman Foundation, the Mulier Institute, and the Ministries of Education, Culture and Science (OCW) and Health, Welfare and Sport (VWS).

Finally, one future recommendation for the Culture Monitor as a whole is to establish more cross-connections between the game industry and other domains within the cultural sector – for example, by looking at the way domains are organized and their cultural and social impact. These insights can help domains learn from and ultimately strengthen each other.

4. WANT TO KNOW MORE ABOUT THE GAMES DOMAIN?

For more data on the Games domain see the Culture Monitor dashboard.

More literature on games can also be found in the knowledge bank of the Boekman Foundation.

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6. DISCUSSION PARTNERS

In 2021 we spoke to the following people to gather information for creating this domain:

- Raymond Frenken (The Netherlands Audiovisual Producers Alliance)
- Derk de Geus (Paladin Studios, Dutch Games Association)
- Sean Gilis (The Creative Industries Fund NL)
- René Glas (University of Utrecht)
- Christel van Grinsven (Dutch Game Garden)
- Peter de Jong (Codeglue)
- Adriaan de Jongh (Independent developer, Dutch Games Association)
- Siuli Ko (K.O. Productions)
- Eline Muijres (Mi’pu’mi Games, Games [4Diversity])
- Maarten Stevens (8D Games, Dutch Games Association)
- Jesse de Vos (The Netherlands Institute for Sound & Vision)
- Viktor Wijnen (Utrecht School of the Arts)

DOMAIN: MUSIC

This domain page focuses on the Music domain in its full scope and contains key figures about the music industry, performances, and visits. The music sector – like the other performing arts – was negatively affected by the coronavirus pandemic because live performances, an important source of income for artists and other workers in the sector, were largely cancelled. The digitization of performances is therefore an important response from the sector that we discuss on this domain page. The analysis also includes trends and developments regarding diversity and inclusion in the Music domain. Within the Music domain, the focus is on overarching developments instead of on the individual music genres. Together with the Theatre domain, Music falls under the broader performing arts sector, see also the Performing Arts domain page.

Written by Janna Michael and Shomara Roosblad
Last updated 26 January 2023

Studio Paisley Kaas / Photography: Lisa Maatjens

SUMMARY

This domain page focuses on the Music domain in its entirety and contains key figures about the music industry, performances and visits. The music sector – like the other performing arts – was negatively affected by the pandemic because live performances are an important source of income for artists and other workers. The digitization of performances is therefore an important response from the sector that we discuss on this domain page. The analysis also includes trends and developments regarding diversity and inclusion in the Music domain.

1. INTRODUCTION AND KEY FIGURES

The music sector consists of numerous subsectors that all contribute to a versatile musical ecosystem[74] in the Netherlands. This system includes different genres, from hip hop to the Dutch *levenslied* (sentimental popular songs), and from death metal to classical music, that are linked to people, organizations, locations and their own circuits or scenes.[75] Although the Culture Monitor tries to do justice to this stratification, it should be noted that data on music attendance, performances, and workers is not consistently collected for every subsector and made available for analysis. Several striking developments are important for the entire domain, however, as evidenced by the collected data, literature, and conversations with people in the field.

Income, performances and visits

The following figures (see next page) show the income for the entire music industry and also the number of performances and attendances in the Statistics Netherlands (CBS) demarcation of the professional performing arts as a whole and of the music performances within that.

Between 2017 and 2021, according to Statistics Netherlands (CBS), an average of 19,000 professional musicians, singers and composers were employed in the Netherlands (CBS 2021a). In 2019, CBS counted 707 professional venues, stadiums and event venues, which were operated by 340 organizations (CBS 2021b). The number of musical performances on professional stages between 2005 and 2019 fluctuated between 17,697 and 21,399 performances per year. The number of visits to those performances increased from 7.5 million in 2005 to 9.4 million in 2019 (CBS 2020). The majority of the performances and visits in the period 2016-2018 were to events in the pop music subsector (CBS 2021b).
In 2020, the number of music performances fell sharply to 8,104 as a result of measures taken due to the coronavirus pandemic. The number of visits fell by 75 per cent to 2.4 million (CBS 2021b). However, 35 per cent of the Dutch population would have seen an online performance at least once in 2020 (VTO 2020). In 2021, the number of performances (7,006) and the number of visits (1.7 million) fell even further.

[74] An ecosystem is the totality of all organisms in a certain area, their mutual interactions and their living environment (Ensie 2021). This term applies to the Music domain because it emphasizes that different players in music are interdependent, and that context is of great influence.

[75] In 2017, the The Council for Culture analyzed the musical ecosystem in detail in 2017. For a comprehensive overview of relevant players, this publication is still relevant.

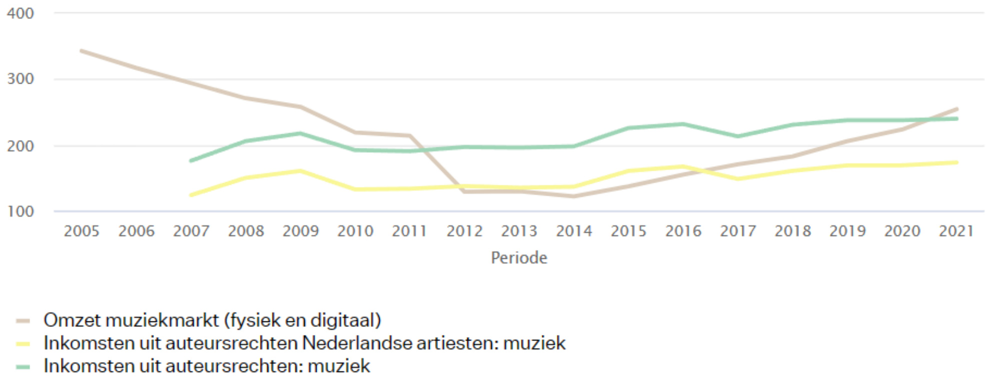

Figure 1. **Music industry revenue**
amounts in millions of euros
[Period; Music market turnover (physical and digital); Income from copyrights Dutch artists: music; Income from copyrights: music]

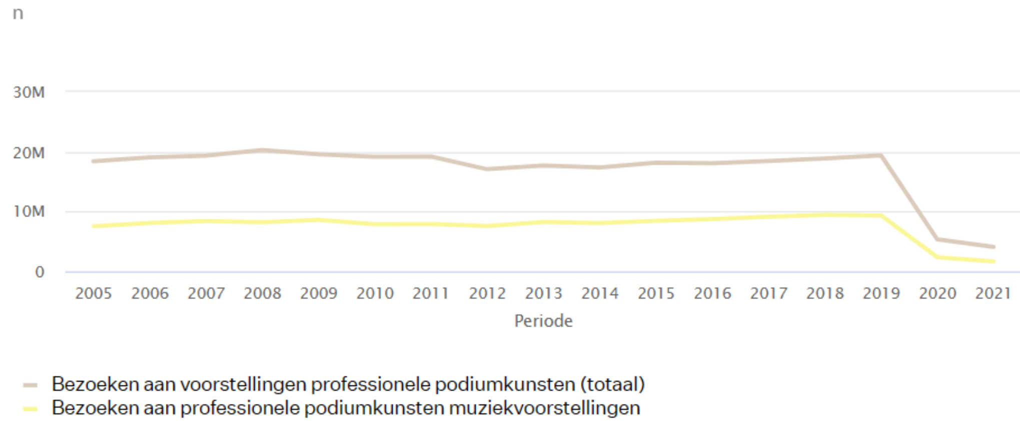

Figure 3. **Visits to music performances and total professional performing arts**
[Period; Visits to professional performing arts performances (total); Visits to professional performing arts musical performances]

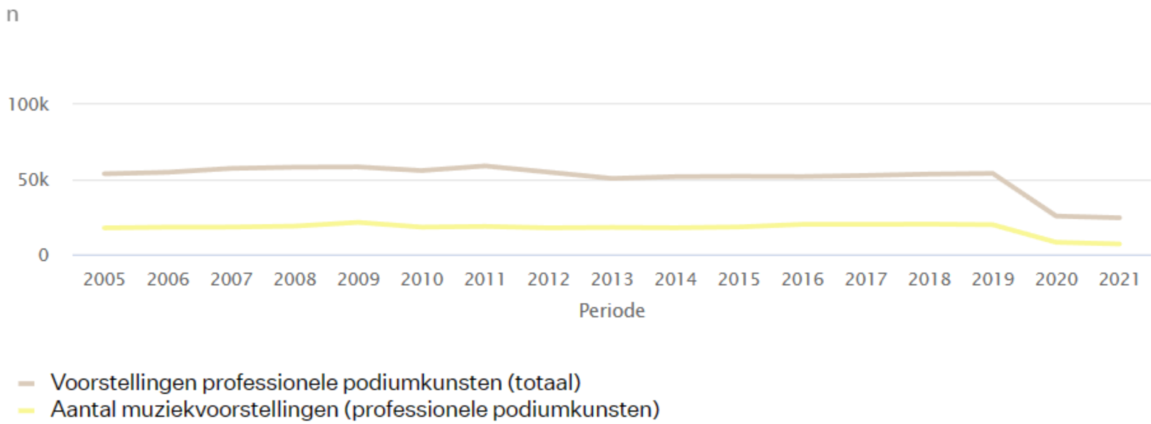

Figure 2. **Number of musical performances and total number of professional performing arts performances in the Netherlands**
[Period; Professional performing arts performances (total); Number of musical performances (professional performing arts)]

Visits in leisure time

This figure shows the percentage of the Dutch population aged 12 and older who visited the following forms of performing arts at least once in 2020.

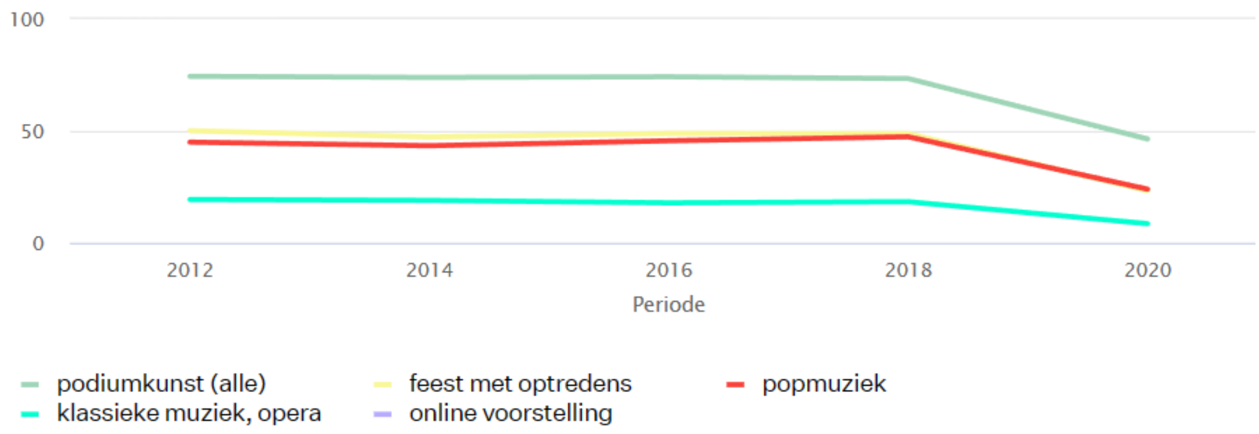

Figure 4. **Visits to various performing arts**
% Dutch people (aged 12 and above)
[performance arts (all); party with performances; pop music; classical music, opera; online performance]
Source: VTO 2020 (Boekman Foundation/OCW/CBS)

2. TRENDS AND DEVELOPMENTS

Changing revenue structures

The music industry is divided into three separate yet still interrelated subsectors: first, the recording industry where the focus is on recording and distributing music in physical or digital form; second, the music licensing industry with an emphasis on music rights and royalties; and third, live music, which involves producing and promoting live performances (Wikström 2014, 10).

Turnover of the Dutch music industry
This figure shows the turnover of the Dutch music industry broken down by type of sound carrier.

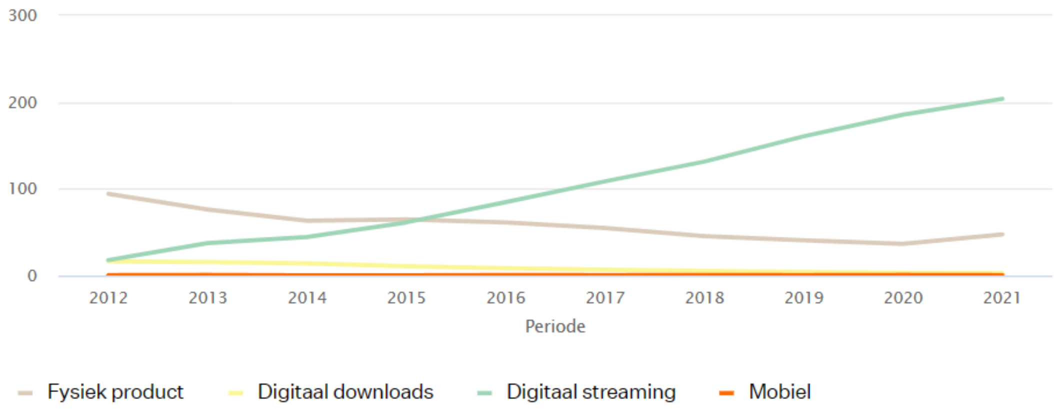

Figure 5. **Turnover by type of sound carrier**
in millions of euros
[Physical product; Digital downloads; Digital streaming; Mobile]
Source: NVPI Audio

The upward trend in the turnover of the Dutch music industry will continue in 2021, according to the annual overview of the NVPI, the trade association for the entertainment industry, for 2021. Streaming services (Spotify, SoundCloud, Apple Music, Deezer, Tidal and YouTube) remained popular and accounted for the majority of sales (80 per cent), although sales increased less than in previous years. The increase in turnover in vinyl is striking in the turnover figures. Although it has been slowly rising in recent years, the turnover of vinyl in 2021 showed an increase of more than 66 per cent, from 17.1 million euros in 2020 to 28.4 million euros in 2021. (NVPI 2022).

Increase in sales of physical sound carriers

The increase in turnover in vinyl indicates that the popularity of this sound carrier has increased sharply in recent years. And not only in the Netherlands, but also in the United States, for example. There, the increase in sales of albums on vinyl last year was around 60 per cent compared to the previous year.

However, because the figures of the NVPI only concern the turnover of the music industry and not the sales in the shops, no complete statement can be made about vinyl sales in the Netherlands. What may have played a role in the increase in turnover is the fact that music lovers were unable to enjoy live performances on Dutch stages for a large part of the year in 2021, due to the measures against the coronavirus. Money normally spent on tickets to performances may have been spent on physical sound recordings instead. The figures for 2022, a year in which the stages were hopefully (largely) able to programme again, will show whether this is indeed the case. While we don't have hard figures on the international music rights trade, there are indications that they have become more popular as investment objects for major labels, as well as other investors outside music (Fèbre 2021).

Revenue from streaming services

How the income from streaming should be distributed has for years been the subject of discussion between music platforms, such as Spotify, and rights holders, such as record companies, musicians and music publishers (for a detailed explanation, see Hesmondhalgh 2020). A thorny issue is that rights holders are currently paid per stream from music platforms, regardless of the length of a piece. As a result, longer pieces of music (which are more common in genres such as jazz, electronic and classical music, compared to pop music) are undervalued (IMPALA 2021a). Another point of discussion between rights holders, media platforms and legislation is the potential for platforms to avoid paying royalties.[76] There has now been a change in European copyright law, the Netherlands' implementation of which in 2021 led to adaptions of the Copyright Act (Eerste Kamer 2021),[77] for example. The new rules offer creators better copyright protection and fairer remuneration for the online distribution of their work (Schuurman 2022).

The pay-out per stream is another point of discussion. Spotify, currently the most popular streaming platform, pays rights holders between 0.003 and 0.005 euros per streamed song[78] (Simons et al. 2020). This amount is then further distributed among the copyright holders, i.e., publishers, labels, artists and composers. In 2020, approximately 7,500 artists earned 100,000 dollars or more per year from their streams on Spotify, while a total of 8 million artists shared their work on this platform (Music Business Worldwide 2021). The online supply of music is enormous: every day on Spotify, 100,000 new songs compete for listeners with more than 90 million existing pieces of music and podcasts. In 2018, 20,000 new songs were added to the streaming service every day, a number that has increased fivefold in four years (Music Business Worldwide 2021, 2022).

Streaming is responsible for an ever-increasing share of the music industry's revenue. Artists see an even smaller slice of the revenue than with radio stations, for example. With the rise of streaming, equitable rights regulation is becoming increasingly important.

Musicians' income position vulnerable

For a study called *Pop, wat levert het op? (Pop, what does it earn?)* Saskia von der Fuhr conducted a survey in 2015 among professional musicians in the Netherlands about their income. The research made it evident that live performances were the most

[76] Due to the so-called safe-harbour arrangement, YouTube was until recently not legally responsible for the copyright of music in videos that users post on their platform. This could also be used to their advantage in licensing rights negotiations (Cooke 2021).

[77] Thanks to this, for-profit online services are required to ask creators for permission to distribute their work. Large platforms such as Facebook, YouTube and Twitter must also filter uploads to prevent the distribution of content that infringes copyright (Schuurman 2022). The Related Rights Act, the Database Law, and the Supervision and Dispute Settlement of Collective Management Organizations for Copyright and Related Rights Act were also amended (Eerste Kamer 2021).

[78] This is further complicated by dependency on licensing deals and how much income is generated by subscriptions and advertising on a platform (Hesmondhalgh 2020).

important source of income[79] (Fuhr 2016). Almost half of musicians' income came from live performances, and just over 20 per cent from giving music lessons and workshops. Furthermore, income from royalties and fees accounted for 15 per cent of total revenue (Ibid., 23). Recent and representative data on income for the entire population of musicians is lacking. It is clear however, that as consumers started to spend less on physical music carriers, which used to be an important source of income for pop musicians, performances as a source of income have become increasingly important. However, this has changed dramatically since 2020, and the start of the coronavirus pandemic and the associated measures. For example, members of the Association of Dutch Pop Theatres and Festivals (VNPF) paid 78 per cent less in artists' fees in 2020, and there was a 76 per cent decrease in the number of performances in music venues (Dee et al. 2021). Given these figures, it is to be expected that the income of musicians has fallen further due to the coronavirus crisis and will not be compensated by increased streaming income.

Even before the pandemic, the income position of musicians in all parts of the domain was vulnerable (Raad voor Cultuur 2017). The sector is working on the implementation of the Fair Practice Code presented in 2017, which should improve working conditions in the sector, for example through fair pay. Since 2020, equal pay for equal work has been in force in the orchestra world with the new collective labour agreement for replacements. Before this, replacements were sometimes paid up to 35 per cent, and on average 10-20 per cent less than their permanent counter parts (Kunstenbond 2020; Blueyard 2021). In December 2021, the Dutch Association of Performing Arts (NAPK) announced that it had reached an agreement with the Kunstenbond artists' association on a collective labour agreement for Dutch music ensembles. The Collective Labour Agreement entered into force on 1 March 2022, with an additional entry point on 1 September of the same year, and will run until 2024. According to the trade association, the new agreement represents an important step towards the Fair Practice policy (NAPK 2021, 2022).

Platform ACCT and the Kunstenbond are committed to improving the labour market in the cultural and creative sector, for example by drawing up guidelines for fees (Kunstenbond 2021). However, the battle for fair wages in the music sector has not yet been won. Although the Fair Practice Code is widely supported by the sector, its implementation depends on many parties. In addition, progress has been under pressure for some time, partly due to the lack of work and income in the sector during the pandemic (Raad voor Cultuur 2021). In an investigation by the Boekman Foundation, which highlights the current state of affairs regarding the Fair Practice Code, it was concluded that one of the most important gains so far is that "the code has made people at all levels aware of the need for fair and sustainable labour agreements" (Leden 2022). Earlier this year, state secretary Uslu received a report which is the result of discussions within the pop sector about reaching solid agreements on fair wages. These talks are part of the fairPACCT programme. One of the results of the analysis carried out by Berenschot is that an additional 7.6 million euros is needed annually to achieve fair pay.

[79] It also became clear that especially musicians with a low income from music derive a relatively large part of their income from performances. Middle-income earners (in this survey €9,000-€36,000) derive a relatively larger share of their music income from giving music lessons and workshops, while the high earners generate a larger share from rights and royalties.

The impact of the coronavirus crisis on organizations in the music sector

During the pandemic, the government made support packages available to keep afloat cultural organizations that had to close their doors to the public. These packages also turned out to be badly needed in the music sector. Not only was there a 76 per cent decrease in the number of performances in VNPF-affiliated music venues in 2020 compared with 2019 as a result of the closure of venues due to the pandemic, but many pop festivals were also cancelled, leading to an 87 per cent decrease in the number of performing artists at pop festivals. In 2021, the second year of the pandemic, there were 79 per cent fewer music performances on pop venues than in 2019. No figures are yet known for the number of music performances at pop festivals in 2021 (Dee et al. 2021, 2022). The members of the VSCD had 60 per cent fewer performances in 2021 than in 2019 (VSCD 2022). The NAPK music ensembles also had far fewer performances[80] in 2020.

After major events were cancelled in 2020 and nightclubs were closed for much of the year, the reopening was slow compared to other sectors, such as sport. In the sport sector, larger events were allowed again more quickly at the end of the summer of 2021. The lack of perspective for festivals, nightclubs and other events led to the UnmuteUs protest of 24 August 2021. Unmute Us represented the Dutch festival and event industry, according to its own statement. Nightlife representatives feared that electronic dance music, in which the Netherlands is a leader, was being marginalized by policy,[81] while they regarded 'losing yourself in dance' as a fundamental form of expression (Brands 2021).

The study *Ongelijk getroffen, ongelijk gesteund* (*Unevenly affected, unequally supported)* shows the financial consequences of the crisis for cultural organizations and also pays attention to the consequences for music venues, independent producers, and multi-yearly subsidized music organizations in 2020 (Goudriaan et al. 2021). The researcher highlights the dramatic decline in audience revenues. For example, the income of multi-yearly subsidized music ensembles, including choirs and orchestras, fell by an average of 78 per cent in the last three quarters compared to the same period in 2019. The decline was 95 per cent at music venues (Goudriaan et al. 2021). Not only the decline in ticket sales, but also the loss of catering income and room rental played a role here. With the help of the pandemic support packages, multi-yearly subsidized music ensembles and orchestras achieved an average drop in turnover of 10 per cent compared to 2019, however a significant proportion still managed to turn a profit. Additionally, a study on the impact of the pandemic on NAPK members shows a relatively small loss of income for music companies in 2020, thanks to the support packages (Schrijen 2021). For many small and medium-sized music venues, the coronavirus support also resulted in a positive annual result, while larger music venues suffered major losses (Goudriaan et al. 2021, 65). The figures of the VNPF members also show that, despite a sharp decrease in income, many losses were absorbed (Dee et al. 2021). For example, 25 per cent of the largely non-profit music venues achieved a negative financial result in 2020, while this was the case for 46

[80] Music ensembles that are members of the NAPK had 18.5 per cent fewer performances in their own venues, 55.9 per cent fewer in the rest of the Netherlands and 73.2 per cent fewer performances abroad compared to 2019 (Schrijen 2021).

[81] The aldermen for culture in Amsterdam, Utrecht and Rotterdam also expressed their concerns about nightlife, and the associated creative capital and talent. In November 2020, they wrote a plea for more support for nightlife (Meliani et al. 2020).

per cent of the venues in 2019 (Dee et al. 2021). Nevertheless, the deficits of the music venues with a negative result in 2020 averaged 2.4 per cent of total revenues, compared to 1.8 per cent in 2019, and some music venues had a deficit of up to 28 per cent of total revenues (Dee et al. 2021, 26).

Forced reorganizations at music venues due to the coronavirus restrictions led to job losses amounting to 22 per cent of employed staff (Dee et al. 2021, 19). Music venues have also been able to give far fewer assignments to musicians, technicians, bookers and other backstage employees. Although the poor position of self-employed persons is not new (SER and Raad voor Cultuur 2017), the reporters in *Unequally affected, unequally supported,* as well as VNPF figures (Dee et al. 2021), showcase the vulnerability of self-employed people in the performing arts sector during the pandemic. Both studies show that the support measures for the sector have not prevented organizations from having to cut-back on employing self-employed persons, temporary workers and the employees of payroll organizations, due to the loss of event opportunities. TOZO, the temporary bridging scheme self-employed entrepreneurs should have compensated for the loss of income by the self-employed (Goudriaan et al. 2021), but so far this does not appear to have been the case.

In the context of this domain analysis, discussion partners point out that many employees have now left the music sector, and there is an apparent brain drain (Waarlo 2021). All these consequences of the pandemic could have a long-term impact on the infrastructure of the music sector.

The consequences of the pandemic following the reopening of society

The consequences of the pandemic and the impact on the infrastructure of the music sector became increasingly apparent in 2022, even after society reopened. Despite the abolition of the anti-coronavirus measures in March 2022, the cultural audience returned only slowly (NOS 2022a). At the end of 2022, this started to pick up, although people waited longer to buy tickets, and new audiences appeared interested (Visser et al. 2023).

In the music sector, returning audiences show uneven progress within subsectors. For example, ticket sales for pop concerts lag behind those for nightlife events. Reasons given for this include catch-up concerts for which people already had tickets, lack of confidence to buy in advance, an oversupply of events since the reopening, and fear of rising infections and returning restrictions (Crabbendam et al. 2022). This in turn results in safer programmes, and a lack of space for talent development. The latter has already come under pressure due to the pandemic and will be discussed in more detail later in this analysis.

In addition, the music sector, like other sectors in the Netherlands, is struggling with staff shortages. In the second quarter of 2022, the tightness in the labour market increased to such an extent as to become noticeable in all sectors (NOS 2022b). The music industry saw shortages especially in venues where there has been a lack of sound and lighting technicians since the pandemic. This has direct consequences for event programmes. During the Amsterdam Dance Event, the Paradiso pop temple was forced to scale down its programming from five to three events per day (Pol 2022).

The impact of the pandemic on education and talent development

The pandemic stood in the way of many educational activities such as visits by musicians to schools, workshops, and music lessons. To illustrate, among the members of the NAPK in 2020, only 56 per cent of educational activities took place compared with 2019 (Schrijen 2021).

A consequence of the difficult financial situation of venues was that they started to schedule ‘safer’ programmes (Broek 2020). This means that mainly well-known acts were booked and there was less room for new talent. In addition to these observations, the discussion partners for this domain analysis point out their concern for small stages. These can be cafés that also host bands, but also sports centres, squats or community centres. These venues provide opportunities for new talent to practice in front of an audience and to build brand recognition (Veldman et al. 2020). In this way they make an important contribution to talent development and are a source of income for musicians. Because these venues are often organized informally, they are not always eligible for subsidies and therefore missed out on pandemic support. As so little systematic data is collected about these places, additional research is needed to gain more insight into their situation.

Separate worlds?

The Music domain is often divided into the subsidized field and the free market. The distinctions made with this classification are often drawn on the basis of genre, although this is somewhat problematic given the increasingly fluid borders between genres. For a long time, the government’s attention was strongly focused on classical music (Raad voor Cultuur 2017, 9). In recent decades, efforts have been made to open up this policy, made for the cultural sector canon,[82] to newer genres through additional subsidy instruments. However, according to the Culture Council (2017) and the discussion partners, the current system is not always a good fit with newer genres within pop music,[83] or the new activities of symphonic orchestras and classical ensembles (Ibid.).

Moreover, the subsidized sector and the so-called free market cannot always be separated. For example, unsubsidized DJs perform on subsidized stages, and subsidized artists also participate in the free market. In addition, many institutions are partly subsidized and also have income from ticket sales and catering. The subsidized sector and the free market are part of a shared ecosystem. Nevertheless, great inequality between the subsectors is experienced in the field (Schans 2020). For example, the working conditions of freelance pop musicians are clearly less good than those of their freelance counterparts in classical music (Vinken 2020). Popular bands or artists are also barely represented in the Basic Cultural Infrastructure (BIS). There is only one pop formation in the current BIS: De Staat. In recent years, despite cuts in the entire budget, the Performing Arts Fund has more room for pop festivals and also artists in pop music thanks to the Upstream: Music scheme (Vrieze 2020, Fonds Podiumkunsten 2021).

A point of criticism of the current subsidy system, according to the discussion partners, is that applying for a subsidy is difficult for people who have no expertise in this area. Moreover, creators who do not have strong ties with the institutionalized cultural world and are not organized are not eligible for many subsidies. This often applies to young hip hop and R&B creators, although there has

[82] Often defined as the institutionalized art world (Bisschop Boele 2017,11) or described as ‘traditional culture rooted in cultural history: classical music, opera and operetta, theatre, modern dance and classical ballet and a literary gathering or reading events’ (Ministry of Education, Culture and Science 2017 , 5).
[83] Pop music is a diverse cultural field containing many genres from reggae to Dutch pop, singer-songwriters, R&B and hip hop (Veldman 2020, 21).

been a catch-up in recent years. For example, the Performing Arts Fund has been supporting urban projects at a national level since 2018, and there is also regional movement. An example is the Meet The Urban Pro's platform. Joan Biekman of CultuurSchakel (Culture Link) and Conchitta Bottse brought together young people and professionals in the industry from The Hague to the Paard venue, for an exchange of information about, for example, career opportunities, music law, training and networks (Hoetjes 2021).

Diversity, equity and inclusion

Music genre preferences, scenes consisting of creators, organizers, and audiences, are often divided along the lines of socio-demographic characteristics (see Krismayer 2019, Peddie 2020 and in the past in the Dutch context, Eijck 2001). For example, recent research by Schaap and Berkers reveals exclusion mechanisms for people of colour in rock music (Schaap et al. 2020a, 2020b). They show that the implicit classification of 'good' rock music as white and male is fundamental to maintaining the white male norm in rock music.

Gender distribution in Dutch music venues

The figure below shows the ratio in 2019 between women and men in various positions at Dutch music venues that are members of the VNPF. IMPALA, the European umbrella organization, and STOMP, the Dutch association of independent music producers, are conducting a survey to map diversity in the independent music sector, and the first results were published in May 2022. The VNPF regularly publishes regarding the ratio of female and male music venue employees by function (Dee et al. 2020), showing that men dominate in management and technical positions, while women are over-represented in educational positions. A study of members of Buma/Stemra showed that being a woman has a negative effect on income (Berkers et al. 2019). The research also shows that women fill their working hours with different activities than men. For example, on average they spend less time on production and mastering, and more on teaching (Ibid.).

The new *Nederlandse Livemuziek Monitor (Dutch Live Music Monitor)* maps out a

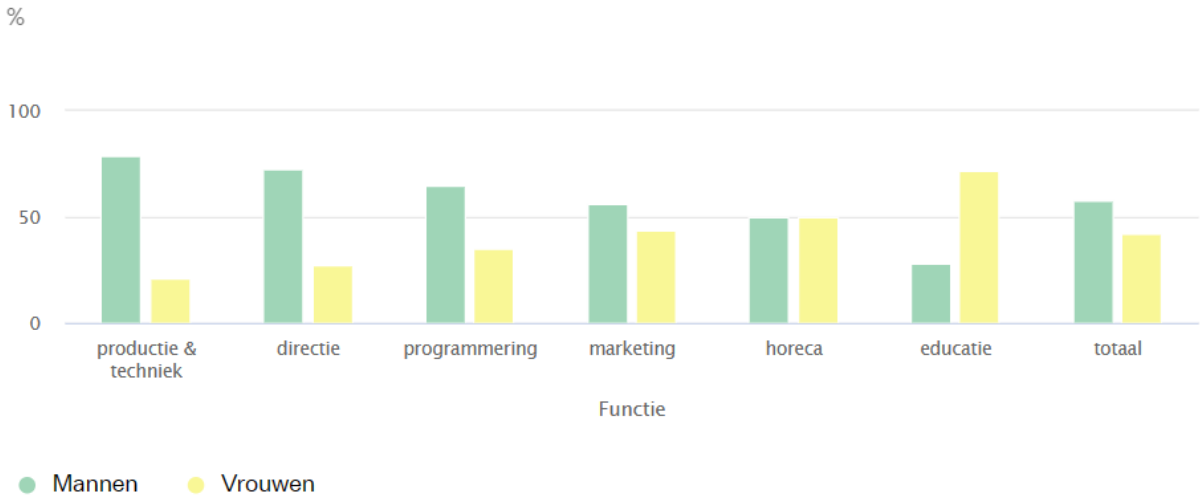

Figure 6. **Gender distribution within functions at Dutch music venues**
[Function: Production & technology; Management; Programming; Marketing; Catering; Education; Total; Men; Women]. Source: Dee et al. 2020

number of dimensions of diversity within pop venue scheduling on a large scale. To this end, the monitor looks at the number of unique artists performing, gender diversity, diversity by country of origin, and other topics. Female artists and artists from countries other than the Netherlands, England and the United States are clearly underrepresented on Dutch stages. For example, in 2019, 78 per cent of performances were by men, and between 2008 and 2019, the artists in 83 per cent of the performances came from the Netherlands, England or the United States. The monitor does note a cautious development towards more diversity (Mulder 2022).

In the Netherlands, apart from gender, few figures on diversity and inclusion in the Music domain are currently being collected. Given the limited availability of Dutch data as well as the international character of the music industry, international research into developments in other countries may also be relevant for the Dutch context. In the United States, for example, the Annenberg Inclusion Initiative reports annually on the gender and race/ethnicity of artists, music industry, and musical repertoire (Smith et al. 2021). In the United Kingdom, UK Music has published biennially since 2016 on diversity in the music industry. The latest UK Music report shows an increase in ethnic diversity between 2016 and 2020 in the UK music industry. The report also shows that people of colour and women are over-represented as trainees and entry-level staff while they are under-represented at senior levels (UK Music 2021, 13). The same unequal distribution is visible in the distribution of income.

In recent years, awareness of diversity and inclusion has grown in the Dutch music sector. For example, there is greater awareness of behaviour that excludes others and more attention is paid to diversifying programmes. The inclusive performing arts agenda was drawn up in 2020 for the inclusion of people with a disability in the performing arts, at the initiative of Holland Dance in collaboration with the LKCA, The British Council, Theaters Tilburg, and the Performing Arts Fund. The agenda has now been signed by more than 140 people representing different organizations. The cultural infrastructure in the Netherlands is still not very accessible to people with a disability, according to a recent report by the Social and Cultural Planning Bureau (SCP) (Vermeij et al. 2021, 125). For example, festivals are sometimes difficult to access for visitors who are in wheelchairs or unsuitable for people who are sensitive to certain stimuli. In addition to the fact that people with disabilities experience physical barriers, they sometimes do not feel they are being treated as fully fledged visitors (Members 2021).

Sustainability and the music sector

An ecological and sustainable society is one of the greatest challenges of our time, and the music sector is also working on this. Not only is the relationship between humanity and Earth increasingly a theme in, for example, contemporary classical music (Christenhusz 2021), but sustainability is also on the agenda of the music sector itself. Musicians often have to travel for performances. There are many examples of musicians trying to reduce the environmental impact of their tours. Radiohead, for example, only flies when there is no alternative. The pop group rents technology from local companies and gives visitors who want to come by public transport priority when obtaining tickets (Rijsingen 2020). Billie Eilish tries to inform her fans about climate-conscious behaviour and gives free concert tickets to those who are committed to the climate (Rijsingen 2020). In the Netherlands too there are musicians and cultural institutions that no longer travel internationally by air for short stays (Raad voor Cultuur 2021, 7). Another initiative to make music performances more sustainable came this year from the UIMA, an umbrella organization of music agencies, which published a list that musicians can use to draw up sustainable rides for their performances (Straver 2021).

There is also movement in the field of event organization. A number of Dutch festivals aim at becoming a recycling festival and are working on reducing food and water waste. They also want to use clean energy and fewer raw materials and are supported in this by Green Deal Circular Festivals.

Furthermore, IMPALA has released a sustainability programme with the aim of having less impact on the climate for its members, independent record companies, by 2030. Means of doing this include offering a CO2 monitoring tool and training for their members, and promoting change among suppliers (IMPALA 2021b).

There are therefore many initiatives in various parts of the music sector aiming at increased sustainability, as well as releasing content addressing how to deal with climate change. Still, the question remains: how much impact will all these initiatives have together? While the CO2 impact of the music sector is relatively small, music and its producers still have a chance to play a relevant role in the awareness-raising process.

3. WHAT ELSE WOULD WE LIKE TO KNOW ABOUT THE MUSICE DOMAIN?

Given the layering of the music sector with quantitative data on various subsectors, there remains a need for cross-sectoral data. For example, the question remains as to how the various sources of income for musicians relate to each other and how this differs per genre circuit.

The importance of small venues for talent development often came up in the conversations that were held with the sector for this domain analysis. There is concern about the decreasing numbers in such places. However, there is a lack of quantitative information on this and the information that is available tells us little about the developments that take place on these smaller stages. Mapping small venues and places that provide occasional playing space – such as cafés, bars, party venues, squats and community centres – would provide valuable knowledge about audiences and lesser-known artists in the music world.

The verdict on the long-term consequences of the pandemic for the music sector is still out. The newer crises that have arisen as a result of inflation and rising energy prices are also relevant for the Music domain to monitor. In September 2022, the Cultural and Creative Sector Taskforce wrote a letter to the Cabinet expressing concern about the consequences of inflation and rising energy prices for the sector and requesting compensation. In October 2022, the Trouw newspaper reported on theatres and concert halls struggling with enormous cost increases, including Chassé Breda and TivoliVredenburg. The government is now in talks with the sector about a possible support package (Jorritsma 2022). It remains important to monitor the consequences properly so that the sector and policymakers can develop strategies for the future.

4. WOULD YOU LIKE TO KNOW MORE ABOUT THE MUSIC DOMAIN?

More literature on diversity and inclusion and music can be found in the Knowledge Bank of the Boekman Foundation here. For more literature on music, economics and the labour market, click here. View more data about the

Music domain in the Culture Monitor dashboard.

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6. DISCUSSION PARTNERS

In 2021 we spoke to the following people for information to help us create this domain page:

- Joan Biekman (CultuurSchakel, as of November 2021 Performing Arts Fund NL)
- Arne Dee (VNPF)
- Iris Daalder (NAPK)
- Chris Dingjan (VVNO)
- Piet van Gennip (the Dutch Ballet Orchestra, VVNO)
- Will Maas (music department Kunstenbond, Fontys Rock Academy Tilburg, independent musician)
- Julian Schaap (Erasmus University Rotterdam)
- Berend Schans (VNPF)
- Peter Smidt (founder of ESNS, formerly of Buma Cultuur)
- Mirjam Terpstra (NAPK)
- Marianne van de Velde (Performing Arts Fund)
- Floris Vermeulen (Performing Arts Fund)
- Kees van Weijen (STOMP, IMPALA)

DOMAIN: PERFORMING ARTS

The Performing Arts domain page provides figures on the number of performances and visits by discipline and the number of people employed in the performing arts. The focus is therefore on overarching data concerning the broader performing arts sector, while the Culture Monitor uses the Music and Theatre domain pages to zoom in on developments within these two subsectors.

Written by Maxime van Haeren and Janna Michael
Last update 23 December 2022

Opera in het bos [Opera in the woods] / Photography: Lisa Maatjens

SUMMARY

The coronavirus pandemic naturally caused a sharp drop in performing arts attendance. The number of visits decreased from 19.4 million in 2019 to 5.4 million in 2020 and 4.1 million in 2021: a decrease of 72 and 79 per cent respectively. The coronavirus crisis also affected employment. In 2020, there were 4,300 fewer people employed in the performing arts than in 2019, after which this number partly recovered in 2021 with an increase of 1,600 employed people.

1. PERFORMING ARTS IN THE CULTURE MONITOR

The Culture Monitor deals with the great diversity of the Performing Arts domain in various ways. In the Dashboard, data is available on the level of the umbrella domain of 'Performing Arts'. This is because much of the available data on the performing arts cannot (yet) be broken down into subdomains such as Music and Theatre.

This breakdown can be made in the domain reports, in which we bring together more specific data and studies. We currently do this for two (sub)domains: Theatre and Music. This allows us to give more depth to the individual developments in these domains. On the Theatre domain page, we present key figures about theatre, (contemporary) music theatre, dance and movement and cabaret, while the Music domain page focuses on the music sector in its entirety. In the future, we will investigate whether we can add further breakdowns (for example for the Dance subdomain) to the Culture Monitor.

2. KEY FIGURES

Performances, visits and workers

The figures on the next pages provide key numbers on (1) the number of professional performing arts performances by discipline, (2) the number of visits to professional venues by discipline, and (3) the number of people employed, broken down by type of position.

The data in these figures show developments in the performing arts over the past 16 years. For example, we see that music always had the most performances compared to the other disciplines within the performing arts. Dance and movement had the smallest number of performances in all years. In 2020 and 2021, because of the coronavirus pandemic and the measures to combat the virus, we see a decline in the total number of performances within the performing arts. In 2020, there was a decrease of 53 per cent compared to 2019; in 2021, we see an even further decrease of 55 per cent compared to 2019 (CBS 2022a).

All the performing arts together attracted more than 19 million visits in 2019. In contrast, in 2020 there were only 5.3 million visits to professional performance art events due to the coronavirus pandemic, and in 2021 this number fell further to 4.1 million visits. The sharp drop in the number of visits is visible across all disciplines, although the number of visits to 'other performances' in 2021 shows a tentative increase compared to 2020. In total, the number of visits in 2020 fell by 72 per cent compared to 2019 and in 2021, the number of visits fell further by 79 per cent compared to 2019 (CBS 2021a). The decrease in the number of visits is greater than the decrease in the number of performances, so the performances that took place had on average far fewer visitors than in previous years.

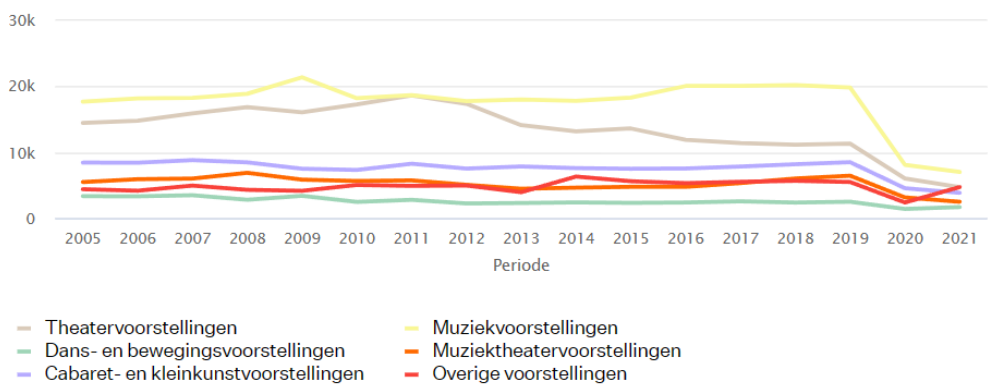

Figure 1. **Number of professional performing arts performances, 2005-2021**
[Theatre performances; Music performances; Dance and movement performances; Music theatre performances; Cabaret and contemporary music theatre; performances; Other

Source: Statistics Netherlands (CBS)

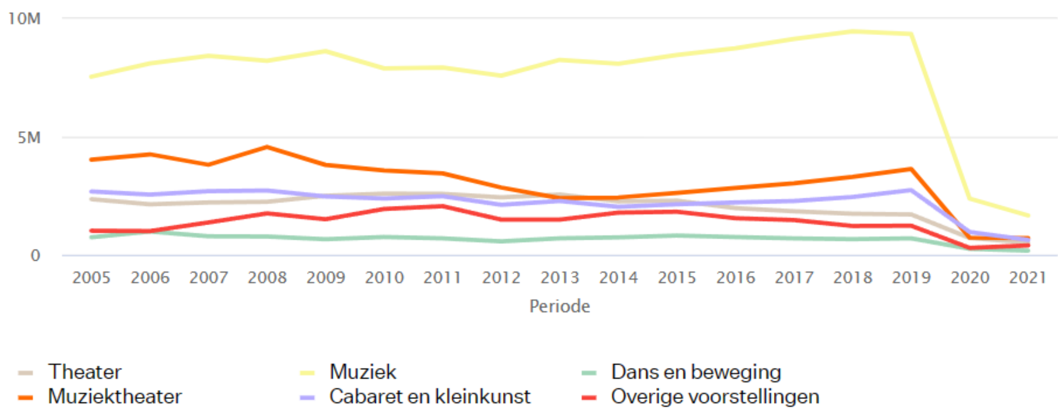

Figure 2. **Number of visits to professional performing arts, 2005-2021**
[Theatre; Music; Dance and movement; Music theatre; Cabaret and contemporary music theatre; Other performances]

Source: Statistics Netherlands (CBS)

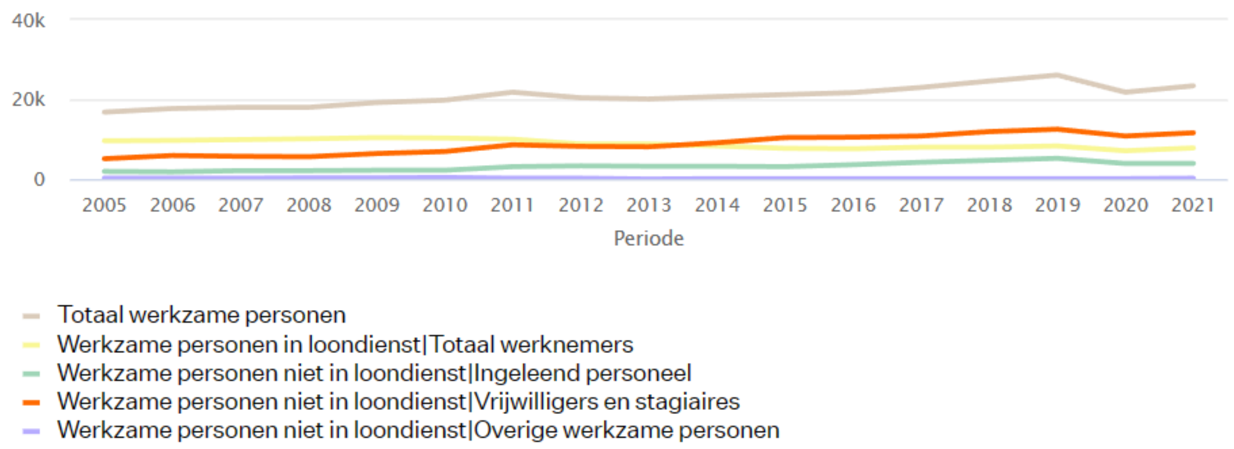

Figure 3. **Number of people employed in the professional performing arts, broken down by type of position, 2005-2021**
[Total people employed; People in salaried employment/Total employees; People not in salaried employment/Temporary staff; People not in salaried employment/Volunteers and interns; People not in salaried employment/Other

Source: Statistics Netherlands (CBS)

Looking at the number of people employed in the performing arts, we see clear growth between 2005 and 2019 – with the exception of a slight decrease in 2012 and 2013: from 16,800 people employed to 26,100 people in 2019 (CBS 2022b). In 2020, the coronavirus pandemic led to an abrupt fall to 21,800 people working, but in 2021 the figures show a slight increase in the total number of workers of 7.3 per cent compared to the previous year. Looking at the type of employment, it appears that the number of employees in paid employment decreased between 2013 and 2016 and only increased slightly between 2017 and 2019. The number of people hired temporarily, on the other hand, grew in 2011 and 2012, remained fairly stable between 2013 and 2015 and grew again between 2016 and 2019. We also see growth among volunteers and trainees between 2015 and 2019. This shows that the general increase in the number of workers in the performing arts can mainly be explained by the number of volunteers and temporary personnel.

In 2020, we see 4,300 fewer employed people than in 2019, while in 2021 we see 1,600 workers return to the performing arts. While there was a decrease in all types of employment due to the coronavirus pandemic, employee numbers fell most among temporary personnel (see also the study by Goudriaan et al. 2021).

3. SOURCES

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DOMAIN: HERITAGE

The Heritage domain page provides information and statistics on various aspects of the field including the availability of movable and immovable cultural assets. It also addresses issues related to the cultural significance of heritage and discusses who gets to define what heritage is. In addition to movable and immovable heritage, the Heritage domain also includes intangible heritage and digital heritage. These two categories receive extra attention in the Culture Monitor.

Written by Maartje Goedhart and Shomara Roosblad
Last update 30 January 2023

Rotterdam Summer Carnival / Photography: Ugur Arpaci via Unsplash

SUMMARY

In the Heritage domain, the focus lies on the community. The shift from an expert-driven definition of what constitutes heritage to the importance of the heritage community – in which everyone participates in cultural heritage – is central to several developments. These include the Faro Convention, the perceived urgency and growth of initiatives regarding multivocality, diversity and inclusion, and the growing interest in intangible heritage.

During the coronavirus pandemic heritage experiences often took place online. As a result, institutions gained the opportunity to reach new audiences, but digitization also presented essential challenges for the sustainable preservation of heritage. The latter calls for more digital partnerships between institutions, both nationally and internationally.

1. INTRODUCTION AND KEY FIGURES

Heritage encompasses a multitude of objects and activities in cultural life, cutting across other domains such as the visual arts, performing arts or games. Heritage reflects the way in which we, as a society, view our environment, as manifested in, for example, an art object, dance performance, museum collection or festival. Cultural heritage is therefore defined in the Heritage Act as follows: "It comprises the entirety of tangible and intangible resources, created in the course of time by people, that give expression to continuously evolving values, convictions, knowledge and traditions, and that offer a frame of reference to present and future generations." (Bussemaker 2015). As a result, heritage and our understanding of it are both constantly changing and subject to the way in which we organize our society.

A monitor, however, requires a demarcation. After all, in order to measure something, you need to know exactly *what* it is you are going to measure. The current delineation of the Heritage domain in the Culture Monitor is in line with *Cultural Life in the Netherlands*, from the Netherlands Institute of Social Research (SCP), in which heritage is divided into movable, immovable and intangible heritage (Broek et al. 2018). This tripartite division is also in line with the definition of cultural heritage in the Heritage Act and with the categories in the publication *Erfgoedbalans* [Heritage Balance] (OCW 2017). The SCP touches on the subject of born digital heritage (materials that originate in a digital form), but this does not yet have a major place in the analysis. In the Culture Monitor, we aim to structurally monitor this aspect of heritage in the future, as a 'new' fourth category.

This leads us to the following delineation:

- *Movable heritage:* tangible heritage that can be moved, such as archives in their physical form or sculptures and paintings in a museum. Mobile heritage, that is: means of transport from the past such as steam trains, also falls under this category (Rijksoverheid n.d.).

- *Immovable heritage:* tangible and site-specific heritage, such as historic buildings and monuments and protected town and village views.

- *Intangible heritage:* cultural expressions that are not tangible and that give communities, groups or individuals a sense of identity. This heritage is dynamic and is constantly being reshaped in conjunction with social changes and interaction; it lives from generation to generation (KIEN n.d.). It can include crafts (milling, chair weaving), performing arts (singing shanties, tambú) or festivities and social practices (Pride Amsterdam, Koningsdag [King's Day]).

• *Digital heritage:* digitized heritage (digital reproductions of heritage materials that were not originally digital), born-digital material (heritage without an analogue equivalent), and digital information about heritage (descriptions of heritage objects, also known as metadata) (Grooten et al. al. 2008). Examples include games, digital texts, photos and videos, or digital designs that are necessary for the creation of objects.

We understand that the four categories are interconnected and not easily separable, especially in the case of rituals or crafts linked to specific objects, or processions in historical inner cities. Digitization is a significant factor in both archiving and creating contemporary art.

Monuments and protected city and village views

The following visualizations provide insight into the many national monuments and monumental town and village views in the Netherlands. (Relative numbers viewable by by enabling the "Per 100,000 inhabitants" on the website.)

The Cultural Heritage Agency of the Netherlands (RCE) has been collecting data on the state of heritage for years and presents facts and figures on built and archaeological monuments, museums and collections, and the historic landscape in its Erfgoedmonitor [Heritage Monitor]. In 2022, the Netherlands had 61,775 national monuments, including windmills, castles, churches, and landscaped green areas, such as parks and country-estate gardens. However, by far the biggest category of national monuments[84] is houses (31,577), followed by farms and windmills (9,909).

Highcharts.com © Natural Earth

Figure 1. **Number of built national monuments in 2022 per province** [Drenthe (1,726); Flevoland (82); Friesland (4,127); Gelderland (6,528); Groningen (2,549); Limburg (5,333); Noord-Brabant (5,816); Noord-Holland (14,011); Overijssel (3,923); Utrecht (5,748); Zeeland (3,666); Zuid-Holland (8,986)]. Source: Heritage Monitor / Cultural Heritage Agency of the Netherlands

Figure 2. **Number of protected city and village views in 2022, per province** [Drenthe (31); Flevoland (1); Friesland (64); Gelderland (44); Groningen (47); Limburg (43); Noord-Brabant (42); Noord-Holland (51); Overijssel (20); Utrecht (45); Zeeland (19); Zuid-Holland (65)]. Source: Heritage Monitor / Cultural Heritage Agency of the Netherlands

[84] We do see large differences between the provinces here. For example, Gelderland has by far the most monumental farms, and most monumental houses are in Noord Holland. If we look at the number of national monuments per inhabitant, Zeeland and Friesland rate highest. Erfgoed op de kaart [Heritage on the map] [RCE Erfgoedmonitor (webgispublisher.nl)] gives an overview of heritage in the Netherlands. On this interactive map, the RCE shows archaeological and built national monuments, reconstruction areas, protected town and village views, world heritage and museums in the Netherlands.

The current state of Dutch heritage is assessed as ‘good’ in the heritage policy review[85] (Horst et al. 2022). The Netherlands has a large number of archaeological monuments and there is a constant stream of archaeological finds every year (Ibid.). Only modern real estate is under-represented on the list of national monuments. Nevertheless, the researchers note that heritage is not always an obvious part of the living environment, which means that there is a risk that insufficient account is taken of its cultural value for spatial developments.

Museums

The data below has a provisional status in the source data of Statistics Netherlands (CBS).

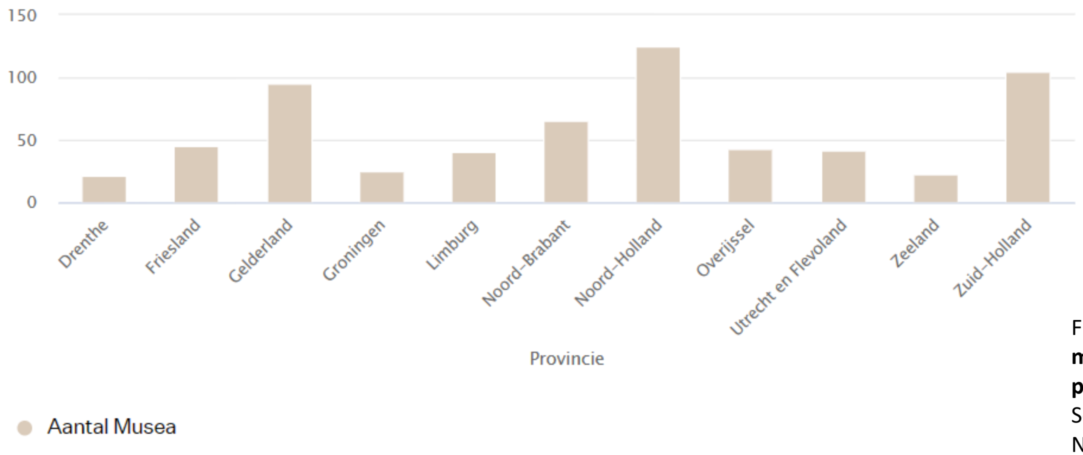

Figure 2. **Number of museums in 2021, by province**
Source: Statistics Netherlands (CBS)

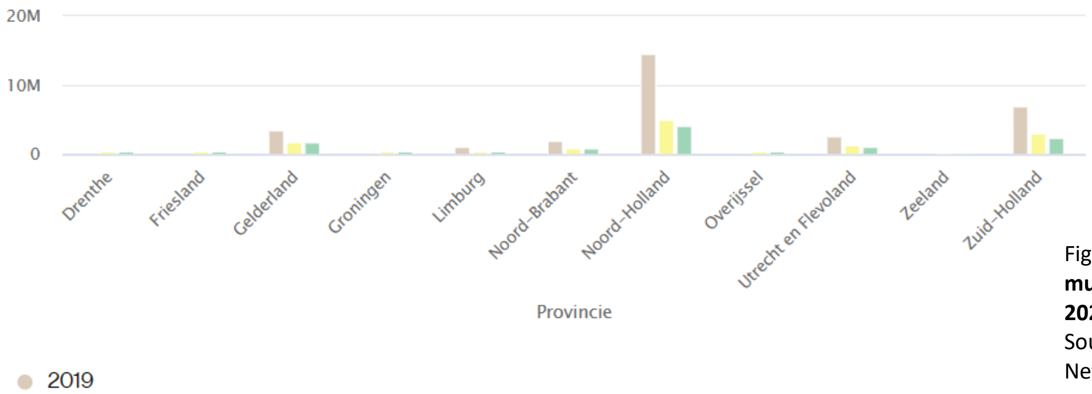

Figure 3. **Number of museum visits 2019-2021, by province**
Source: Statistics Netherlands (CBS)

[85] The Heritage policy review is an evaluation study that takes place at least once every seven years in accordance with the Periodic Evaluation Survey Regulations. In 2022 it was carried out by the DSP group. The study examined how the state of heritage in the Netherlands has developed from 2016 to 2022, and to what extent heritage policy was effective and efficient. In addition to movable and immovable heritage, intangible heritage and digitization were also considered as themes. According to the researchers, the expansion of the intangible heritage inventory over the past five years illustrates how community stipulation is increasing in the definition of heritage (read more about this under Participation and Faro: who decides what heritage is? [Faro - Participation in Cultural Heritage | Cultural Heritage Agency (cultureelerfgoed.nl)]). The researchers also conclude that digital heritage is experiencing progress, partly through the possibilities offered by digitization.

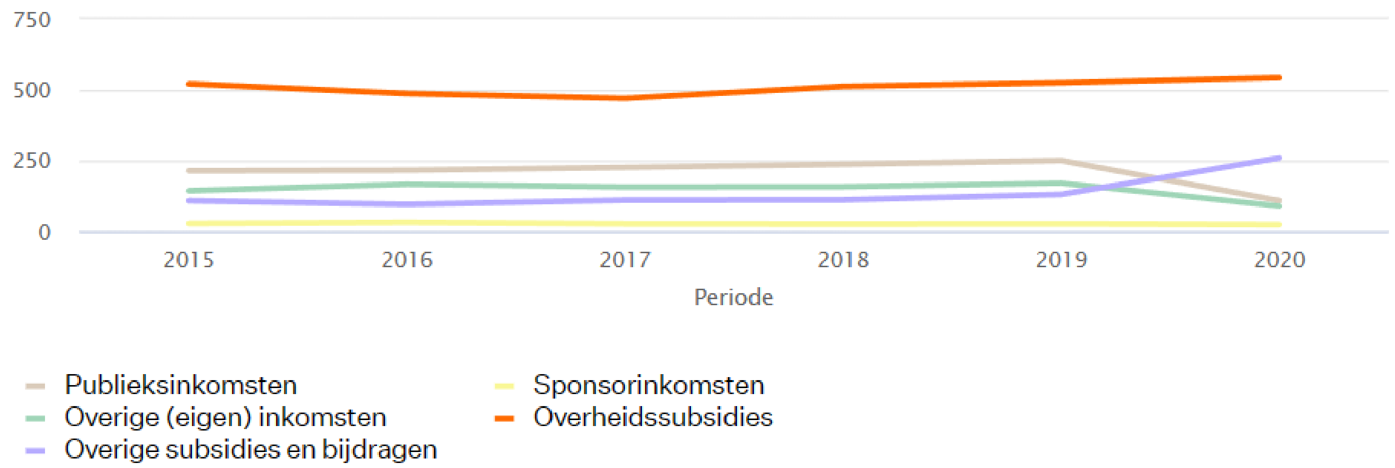

Figure 4. **Income and subsidies of museums 2015-2020**
€ x 1,000,000
[Entrance fees, café & shop revenues etc.; Sponsorship; Other (self-generated) income; Government subsidies; Other subsidies and contributions]

Most museums are located in Noord Holland and Zuid Holland (19.9 and 16.7 per cent respectively of the 2021 total), and more than half of all museums are history museums. But heritage is of course more than just tangible culture. The Dutch Centre for Intangible Cultural Heritage (KIEN) – which maps out the various forms of intangible heritage and safeguards it for the future – reported 200 different types of heritage in their 2022 inventory.[86] The largest category is 'Festivities, rituals and social practices', which includes, for example, King's Day, various flower parades and the 'kopro beki' tradition.

[86] The Inventory Intangible Cultural Heritage in the Netherlands contains intangible heritage of which the heritage community, group or individual has written a safeguarding plan to give the heritage a future. That plan has been tested by an independent committee. Heritage management is evaluated every two years (KIEN nd.). However, the inventory does not provide a complete overview of all forms of intangible heritage, as it depends on registrations by practitioners themselves, who must also be aware of the existence of the inventory.

Intangible heritage and participation in heritage

The numbers following three visualization on the various forms of intangible heritage in the Inventory Intangible Cultural Heritage in the Netherlands add up to a higher total than stated in the text. This is because one item in the inventory can fall under multiple categories.

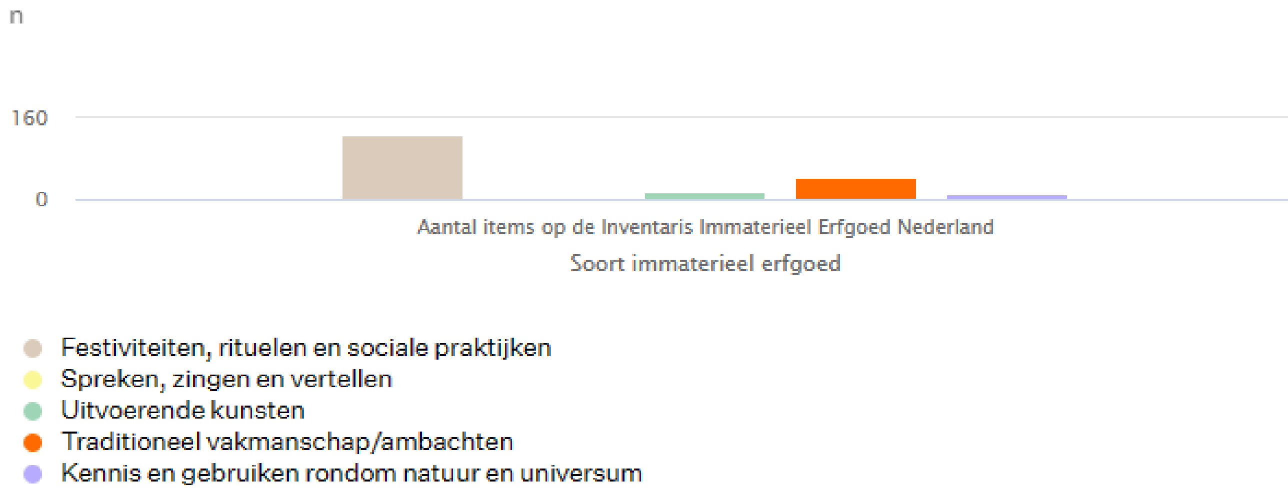

Figure 5. **Number of forms of intangible heritage in the Inventory Intangible Heritage on 8 December 2021, by category**
[Festivities, rituals and social practices; Speaking, singing and storytelling; Performing arts; Traditional artisanship/crafts; Knowledge and customs around nature and the universe]
Source: Dutch Centre for Intangible Cultural Heritage and Boekman Foundation/OCW/CBS

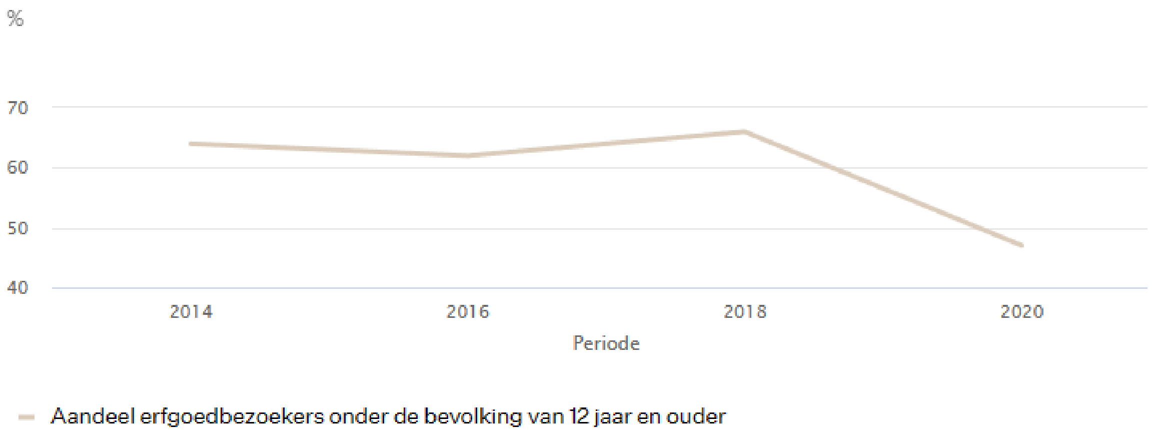

Figure 6. **Heritage visits: Proportion of the population aged 12 and above visiting heritage at least once, 2014-2020**
[Period; Proportion of heritage visitors aged 12 and above in the population]
Source: Dutch Centre for Intangible Cultural Heritage and Boekman Foundation/OCW/CBS

It is considerably more difficult to determine the extent of digital heritage (collections) (Mulder et al. 2019). Existing studies are often based on samples from heritage institutions that provide limited representation and therefore do not convey an accurate picture of the absolute size of digital collections. According to the 2017 ENUMERATE study, 35 per cent of the collections of heritage institutions has been digitized and 74 per cent has been made digitally available (DEN 2017). However, the study says nothing about the size of born-digital collections, except that 72 per cent of the institutions also collect born-digital material.[87]

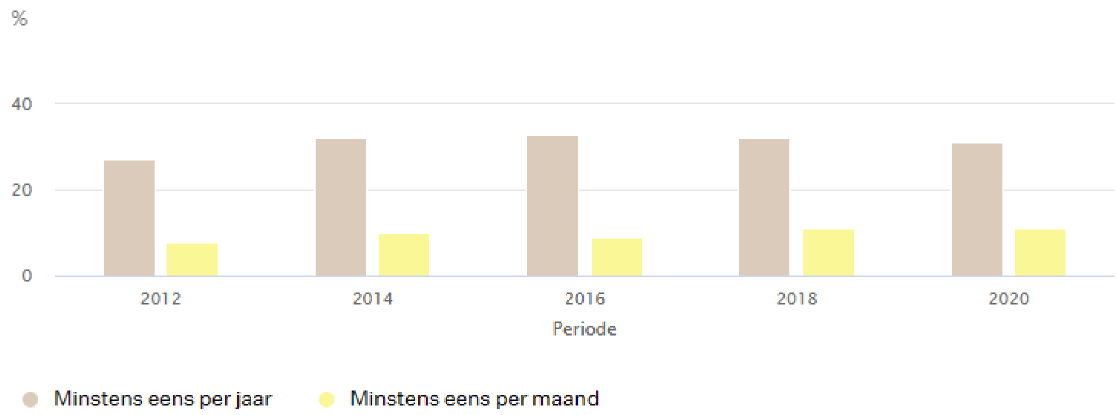

Figure 7. **Heritage practice: Proportion of the population aged 12 and practicing a heritage activity at least once, 2012-2020**
[Period; At least once a year; At least once a month]
Source: Dutch Centre for Intangible Cultural Heritage and Boekman Foundation/OCW/CBS

2. TRENDS AND DEVELOPMENTS

Cultural identity: why is heritage important?

Heritage is not only important for an understanding of our past, but also gives meaning to our society, today and in the future. After all, we all carry heritage with us and help to shape it: whether we celebrate Christmas, like cooking Dutch pea soup, or dance the tambú. It is therefore important that the way in which we deal with this heritage is in line with today's society (and population composition) and that stories are passed on to future generations (Engelshoven 2018). Because, as the Council for Culture writes: “In heritage, an object or action establishes a personal connection between people and (their own or another) history, traditions and stories. No other part of our society – sport, economy, science, religion – makes such an explicit appeal to these values” (Raad voor Cultuur 2021, 6).

Cultural heritage therefore determines the identity of the living environment and is increasingly used as a means to strengthen this (local) identity (Trienekens et al. 2016). We not only see this at regional level: municipalities too are increasingly using local heritage to attract tourism or to connect residents with their living environment.

[87] It is also significant that ENUMERATE's research only says something about the collections of heritage management institutions, and nothing about the material at cultural-producing institutions. According to our discussion partners, the figure of 35 per cent for heritage institutions' digitization is also optimistic. Because museums have relatively small collections compared to archives, the unweighted average is strongly raised. For example, the museum figures for 2021 show that 67 per cent of museums' permanent collections is accessible to the public on the internet, which is 1 per more than in 2020 (Visser et al. 2021, Visser et al 2022).

The importance of heritage to society was once again emphasized with the establishment of the Commissie Collectie Nederland [Netherlands Collection Commission], which was appointed in September 2020. In order to protect heritage, the commission recommends in its report of February 2022, *Onvervangbaar & Onmisbaar — naar een dynamisch beschermingsmodel voor de Collectie Nederland* [Irreplaceable & Indispensable – Towards a dynamic protection model for the Netherlands Collection], that a national export licensing system should be introduced to legally monitor the unwanted sale of important cultural heritage abroad. In addition, the advice is that a "solid financial foundation" is needed in the context of the protection of cultural property. Secretary of State Uslu presented her response in March 2023 (Uslu 2023).

Dealing with cultural heritage in the physical living environment will be regulated from 1 July 2024 via the new Environment and Planning Act. This aims for more cooperation between citizens, companies, and civil society organizations at national level. The idea is that spatial projects will be closer to society and that participation within projects will be promoted. Participatory projects can also give meaning to a new composite community or identity (Trienekens et al. 2016). The designation and handling of protected town and village views will soon also be conducted on the basis of this law (RCE n.d.)

Participation and Faro: who defines what heritage is?

The question of what heritage is and why it is important is closely related to the question of who determines what heritage is. According to the Faro Convention,[88] people are central and the approach to heritage is no longer purely expert-driven (Hanssen et al. 2021). The focus seems to have shifted from cultural heritage in itself to the people involved (Engelshoven 2021). Heritage is thus linked to the democratic principle that it belongs to, and is for, everyone, and so contributes to an inclusive society (Engelshoven 2021). The national cultural identity is therefore not fixed but is an interpretation of, and is chosen from, cultural heritage (Beugelsdijk et al. 2019). With this as a starting point, it is important that people also have access to heritage and can participate in it.[89]

An important term here is *heritage community*: "A group of people who attach such importance to certain heritage that they want to preserve and transfer it. Participating in cultural heritage means shaping cultural citizenship" (Hanssen et al. 2021). This also means that something is only heritage if people attach a certain meaning or value to it. At KIEN, too, the community determines what heritage is, and is itself responsible for adding heritage to the inventory and preserving it.[90] In this sense, cultural professionals, practitioners, and creators also form heritage communities with their own needs, both those involved in making or practicing heritage, and those who manage it (such as archivists, conservators, or curators).

[88] The Faro Convention is an international agreement that "contains objectives for broadening and intensifying the role of cultural heritage in all aspects of society" (Engelshoven 2021, letter to parliament). The main principle is that every person has the right to be involved in heritage and to give it their own meaning. Dutch heritage organization the RCE is currently working on the process of signing and ratifying the Faro Convention of the Council of Europe through an implementation agenda. This implementation agenda will be presented to the State Secretary for Culture and Media at the end of 2022.

[89] It is possible to participate in discussions about various Faro themes such as archaeology, oral history, multivocality or digitization using the Dutch Faro platform.

[90] This does not mean that if the heritage is not on the list, it is not heritage. The emphasis is on making intangible heritage and its variety visible and accessible, but being on the list is not an official recognition (KIEN).

Diversity, equity and inclusion: where are we now?

In line with shaping a 'new' cultural citizenship, heritage institutions strive for multivocality and inclusion. The International Council of Museums (ICOM) therefore proposed a new museum definition[91] in 2019 in which museums are "democratizing, inclusive and polyphonic spaces for critical dialogue", which through "acknowledging and addressing the conflicts and challenges of the present […]" and "ensuring equal access to heritage for all people", ultimately "contribute to human dignity and social justice, global equality and planetary wellbeing" (ICOM 2019; Huut 2022).

However, this proposal from 2019 was seen as too political, resulting in fierce international discussion (Small 2019). A new museum definition was adopted at the ICOM conference in August 2022 after a lengthy process. Instead of the more committed passages, it now says that museums "foster diversity and sustainability […] They operate and communicate ethically, professionally and with the participation of communities, and offering varied experiences for education, enjoyment, reflection and knowledge sharing."[92] With this, "the sharp edges of the text have been taken off" and the "ideological sting seems to have been removed" (Metropolis M 2022, Huut 2022).

We also see an anchoring of multivocality in policy across the cultural sector. In 2019, the Ministry of Education, Culture and Science (OCW) launched the Code Diversiteit en Inclusie [Diversity and Inclusion Code][93] together with the VSB Fund and the six National Culture Funds. From 2021, this code, together with the Culture Governance Code and the Fair Practice Code, will be an integral part of the assessment of grant applications (Raad voor Cultuur 2020). Despite these ambitions, according to the Council for Culture, there is still a lot of catching up to do in the field of diversity and inclusion (Raad voor Cultuur 2020). This demand for change is also visible in the field. In 2020, partly in response to the international Black Lives Matter movement, several articles appeared in the media and open letters[94] were sent to boards and policymakers in the Dutch cultural sector.

Where the sector stands today is still difficult to assess. There are several reasons for this. First of all, there is a lack of indicators and data to measure diversity and inclusiveness – and the data that is available often concerns personal data that is (more) difficult to use because of GDPR (General Data Protection Regulation) concerns. Secondly, diversity and inclusion are broad concepts that are interpreted in different ways. It is not only about cultural background, but also concerns age, gender equality, people with a physical and/or functional disability, the LGBTQIA+

[91] The museum definition defines what museums are and what they are not. In the Netherlands, it is the basis for which museums are included in the museum register, a quality mark for museums. In addition, the museum definition gives direction to how museums themselves interpret their task.

[92] The full, definitive museum definition reads: "A museum is a not-for-profit, permanent institution in the service of society that researches, collects, conserves, interprets and exhibits tangible and intangible heritage. Open to the public, accessible and inclusive, museums foster diversity and sustainability. They operate and communicate ethically, professionally and with the participation of communities, offering varied experiences for education, enjoyment, reflection and knowledge sharing." (ICOM 2022). A 92 percent majority of ICOM members agreed with the new museum definition.

[93] The goal of the Diversity and Inclusion Code is "that the cultural and creative sector represents the broad diversity of Dutch society" on the basis of the four Ps: public, partners, personnel and programming.

[94] Journalist Lucette ter Borg, for example, spoke to museum directors about diversity and inclusion for NRC. The theatre world responded to the Black Lives Matter movement with an open letter in the Theaterkrant, which was signed by more than 600 professionals of colour. And curator of the Stedelijk Museum Vincent van Velsen wrote an open letter to Amsterdam Alderwoman for Culture Touria Meliani, in which he stated that the Stedelijk Museum excludes artists of colour.

communities and socio-economic status, among other factors. Finally, there is still no clarity or consensus across the sector about what exactly we want to measure, why and how (read more about this in our theme chapter Diversity, Equity and Inclusion).

There are, however, various initiatives in the field of diversity and inclusion in the heritage sector. For example, the Musea Bekennen Kleur foundation offers museums a guideline for the implementation of the Diversity and Inclusion Code, with the aim of "sustainably uniting heritage institutions in their pursuit of embedding diversity and inclusion in the DNA of the heritage sector". In addition, in September 2021, the Museum Suriname Foundation announced that a new museum about Surinamese history and culture and the complex relationship between the Netherlands and Suriname will open in 2023 in Amsterdam (Sneekes et al. 2021). This shared history is also central to the exploratory proposal for museum facilities for the history of slavery[95] that NiNsee, Museum Zonder Wallen and IZI Solutions completed in May 2021. The developments are not only taking place in the museum sector: theatres and theatre companies are also joining forces (see the Theatre domain chapter), there are numerous initiatives to make the book sector more diverse (see the Literature domain chapter) and investments are being made in the Dutch film sector (see the Audio-Visual domain chapter).

Nevertheless, the Council for Culture notes that there is an uneven progression of the four Ps, where Programme and Public (audience) were given priority over Partners and Personnel (staff) (Raad voor Cultuur 2020). This is not unique to the cultural sector but is also evident in other social sectors. The Diversity at Work project of the Social and Economic Council (SER) therefore supports companies in the public and private sector with the Diversity Charter, promoting a mixed workforce and an inclusive business climate. Several museums[96] have now signed the declaration of intent and governments, educational institutions and science are also represented in the charter.

Intangible heritage and the increasing interest it attracts offer excellent opportunities for diversity and inclusion within heritage. For example, the inventory of KIEN is supplied by the community and therefore contains a diversity of holidays and traditions, such as Chinese New Year, the Antillean music tradition of tambú, farmers markets in Drenthe, and the Easter bonfire at Espelo. To function as a reflection of Dutch society and to pass on the culture that shapes us today to the generations of tomorrow, diversity and inclusiveness are necessities within heritage. There is awareness within all the disciplines of the heritage field, but that alone is not enough to lead to actual change.

Coronavirus and more attention to digital

The anti-coronavirus measures resulted in many heritage institutions having to close their doors or face major restrictions. Numerous activities were cancelled or could only take place in an adapted form. Even after the end of restriction measures in March 2022, the pandemic has left its mark on the heritage sector. The Dutch Museums Association predicts that total museum visits

[95] On the advice of the Mayor and Aldermen of Amsterdam and outgoing minister Van Engelshoven, a joint committee of the Amsterdamse Kunstraad [Amsterdam Art Council] and the Council for Culture examined the plans for a national slavery museum in Amsterdam from May 2021 to November 2021. In November 2021, a recommendation was issued in response to the exploratory report in which the advisory councils consider the importance of a slavery museum to be obvious. In September 2022, John Leerdam and Peggy Brandon were appointed to map out the national slavery museum.

[96] Such as the Rijksmuseum, Groninger Museum, FOAM, Kunstmuseum Den Haag and Maritime Museum Rotterdam.

in 2022 will number 23.8 million, which still falls short of the 2019 level (32.6 million museum visits) by a quarter (Museum Association 2022). In addition, older volunteers in particular are finding it difficult to return. This is concerning given that volunteers are an important part of the industry. Together with the interns, they account for 23 per cent of the employed FTEs (Museums Association 2022). At the same time, more space was created for digital cultural offerings, with opportunities for reaching 'new' audiences. For example, there were virtual tours, performing arts institutions shared recordings of performances online, and there were calls to get started with art and heritage yourself, such as from the Instagram platform Tussen Kunst and Quarantine [Between Art and Quarantine]. "The digital heritage of the future is being created now," one discussion partner told us.

In 2021, two-thirds[97] of the permanent museum collection was to be accessible to the public via the internet (Visser et al. 2022). And online activities took place at three-quarters of all museums, ranging from virtual tours to assignments or challenges (Ibid.). In 2020 this was 82 per cent[98] (Visser et al. 2021), and content was accessed by more than 14 per cent of the Dutch population who viewed a museum collection or exhibition via the internet (as the most recent leisure survey[99] showed). About a fifth of Dutch people have viewed visual art online (VTO 2021).

In addition, almost 40 per cent of Dutch people have used the internet to look up information about old customs, crafts or traditions, historic buildings, objects or events, or local or regional history. And previous research shows that no less than 80 per cent of the Dutch population uses digital heritage (Mulder et al. 2019). It is expected that this number will have increased in 2020 and 2021 due to the intensified efforts of the institutions. Similarly, the Innovatielabs [Innovation Labs] programme[100] that started in 2022 should give an impulse to new resilience and digital innovation in the cultural and creative sector.

Sustainable storage is a challenge

Although considerable investments have been made in the Netherlands in recent years in digitizing heritage collections and making them accessible, the recent growth in the number of digital initiatives has once again put the issue of the sustainable preservation[101] of this digital content on the map.

Digital technology is developing at a rapid pace and hardware and software quickly become obsolete (Museumvereniging n.d.), which has a major effect on born-digital material. The fast pace of technological developments makes it impossible for professionals and makers to be aware of

[97] This share excludes two large museums with 'major backlogs' in the digitization of their collection (Visser et al. 2021). However, the Museum Association does not indicate which museums this refers to, and it is expected that the share including these museums will be much lower.

[98] Unfortunately, no figures are known for 2019, so a comparison is not possible. It is known, however, that extra efforts were made to reach people at home in 2020 (see Joode 2020), and it is therefore expected that this number will also have grown in 2020 compared to 2019. In 2021 we will therefore see a slight decrease, which is not surprising given that physical visits were possible again.

[99] Since 2020, the Boekman Foundation has taken up the analysis of the Vrijetijdsomnibus [Leisure Omnibus] (VTO) together with CBS and the Mulier Institute. The VTO is a study of the leisure activities of Dutch residents, in which interest in, visits to and the practice of sports and culture are central.

[100] The Creative Industries Fund NL (on behalf of all national culture funds) and CLICKNL are implementing the programme on behalf of the Ministry of Education, Culture and Science.

[101] See also the National Digital Heritage Strategy, which describes how heritage collections can be digitally connected from the perspective of the users of that heritage. The strategy has been implemented by the NDE since 2015.

everything. Moreover, ICT is often tailor-made, for example in the case of digital art. Because born-digital heritage has no analogue equivalent, archiving and keeping it accessible is a challenge for many institutions. When updates are no longer available, the public loses access to this heritage (Wijers et al. 2016, DEN 2017). The knowledge of sustainable storage is still in its infancy[102] and this is why networks and partnerships are more important than ever for sharing each other's expertise when it comes to archiving, documenting, and making heritage available. Discussions with the sector that were held for this domain page in 2021 show that more and more partnerships are being established, including internationally. DEN and the Digital Heritage Network (NDE) are especially committed to this.

Digital accessibility is also about the question of how to preserve art and heritage. The way in which something is made visible can have consequences for the authenticity of a work. It is good to be alert to ways of preservation that do not change the functionality or appearance of the work.

Sustainable strategy and services

Digital transformation is affecting makers, institutions, products, and the public. "To further enable cultural institutions to offer new cultural experiences online and to compete with other digital services, investments in knowledge, infrastructure and digital services are required" (Cohen et al. 2020, 55). After all, digitization affects the way in which new services or productions are developed, and their public reach, business operations, and manufacturing processes (DEN n.d.). A sustainable digital strategy is needed to take advantage of the opportunities that digitization offers. DEN has developed a focus model for this and heritage institutions are working with the NDE through the National Digital Heritage Strategy to bridge the digital barriers between the institutions and linking their content to make it accessible to each other. In the field of digital media art, LIMA, the platform for digital art, is committed to sustainable archiving, conservation, and distribution, together with museums, artists, academies and universities. The *Beleidsdoorlichting Erfgoed* [Heritage Policy Review] calls for a stronger positioning of born-digital heritage (including the digital creative processes) in heritage policy and the associated instruments (Horst et al. 2022).

3. WHAT ELSE WOULD WE LIKE TO KNOW ABOUT THE HERITAGE DOMAIN?

It is important to follow the pursuit of multivocality and inclusiveness. For example, there is a lot of relevant literature on the Dutch Caribbean, such as the Antillean heritage collection[103] by Gert Oostindie and Alex van Stipriaan, or Boekman 128 on culture in the Caribbean part of the kingdom of the Netherlands. KIEN is also working in collaboration with the Caribbean islands on three websites for intangible heritage, so that the islands can add their own heritage files with inventories. The Bonaire website has been online since March 2022. How can we include such data and information in the monitor, and in what form is this desirable? This report also lacks data on diversity and inclusion in subcategories such as archaeology, landscape, and built heritage. We want to pay more attention to this in the next update.

[102] This does not apply to 'static' digital heritage (such as documents), as there is more knowledge of sustainable preservation here.
[103] This two-part book, written by a team of Antillean and Dutch scholars, offers a collection of reflections on the cultural heritage of Aruba, Bonaire and Curaçao and of the Antillean diaspora in the Netherlands.

The data for intangible heritage is still limited. There are plenty of qualitative examples, but due to a lack of structural data, it remains difficult to gain a quantitative insight into intangible heritage. An attempt is made for practice and visits in the Vrijetijd Omnibus [Leisure Omnibus] (VTO), but it remains limited.

Data on digital heritage is also not always accessible or available. Which indicators do we use, for example to measure digital consumption (visits/visitors)? And how do these relate to physical consumption, such as a visit to a museum? Research is currently being carried out into digital heritage indicators, carried out by the NDE, the continuation of which will lie with the RCE. It is important that the Culture Monitor connects to these developments.

Finally, it is important to continue to monitor the impact of the coronavirus crisis on the heritage sector as closely as possible in the coming years. This concerns both the financial position of the sector, the programming, and the involvement of the public, volunteers, and society at large. How sustainable is the development of the focus on digital heritage, and what impact does this have on the public? Yet coronavirus is no longer the only crisis: there is also the climate crisis,[104] the ongoing consequences of demolition due to gas extraction in Groningen,[105] inflation and rising energy prices.[106] We will continue to monitor the impact of these crises on the heritage sector in the coming years.

4. WOULD YOU LIKE TO KNOW MORE ABOUT THE HERITAGE DOMAIN?

View more data about the Heritage domain in the Culture Monitor Dashboard.

More literature on the Heritage domain can also be found in the knowledge base of the Boekman Foundation.

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[104] As climate activists also made clear with the *Girl with a Pearl Earring* in the Mauritshuis in October 2022.

[105] In the province of Groningen, more than 880 buildings have been demolished since 2012 as a result of gas extraction (NOS 2022). National monuments are not allowed to be demolished, but heritage associations from the province are concerned about what the development of the demolition will mean for the village view. In 2021, 1,408 of the 8,271 listed addresses in Groningen had submitted at least 1 damage report since 2012 (DSP Group 2022).

[106] Many cultural institutions in the Netherlands are currently struggling with increased energy prices. In some cases, this even means a closure for small museums in the winter months (Friedrichs 2022). In October 2022, the Museum Association appealed to the government for energy compensation on behalf of 470 museums. In the 2022 Autumn Memorandum, the government announced that there would be an additional price adjustment (compensation) in the budgets of ministries for cultural institutions, among others, as a result of the price increases.

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6. DISCUSSION PARTNERS

In 2021 we spoke to the following people while gathering information for the development of this domain page:

- Marco van Baalen (KIEN)
- Aspha Bijnaar (Musea Bekennen Kleur)
- Maartje de Boer (RCE, Erfgoedmonitor [Heritage Monitor])
- Marcus Cohen (DEN)
- Maurits van der Graaf (Pleiade)
- Chris Groeneveld (NDE)
- Susanne Verburg (KIEN)
- Gaby Wijers (LIMA)

DOMAIN:
VISUAL ARTS

The Visual Arts domain page discusses developments and variations in the position visual artists hold in the (labour) market, and the associated challenges. Museums, art consumption and digitization are also discussed. The Visual Arts domain includes the creators of autonomous visual arts in all media, as well as the associated infrastructure that includes museums, galleries, art fairs, studios and creative hubs.

Written by Rogier Brom and Thomas van Gaalen
Last updated 25 January 2023

Habitat Multiform exhibition / Photography: Lisa Maatjens

VISUAL ARTS

SUMMARY

Before the pandemic, the position of visual artists was already particularly precarious. And although many institutions have insisted on newly drawn-up employment guidelines since the coronavirus pandemic, the field of visual arts remains extremely unequal. The wage differences between visual artists are large, female artists are under-represented at fairs and in collections, and despite the increased focus on diversity, museum and institutional boards remain white, highly educated and male.
In addition, visitor numbers for art museums and institutions are still low since the pandemic, which means some institutions are at risk of irreparable financial damage. Yet there are also bright spots: the fight for diversity and inclusion is intensifying, art buyers remain loyal, and digitization has offered a partial solution for museums, makers and galleries.

1. INTRODUCTION AND KEY FIGURES

In this Visual Arts domain analysis, the Culture Monitor considers trends and developments surrounding the production, distribution, exhibition, purchase and experience of visual art objects. For the purposes of this analysis, visual art objects include objects with a 'flat' and static form – such as paintings and drawings – as well as sculptures, video art and installations. These can be found in numerous contexts in the Netherlands, including in galleries, fairs and studios, and also museums and creative hubs, just to name a few examples. Because of this wide distribution, visual art inevitably has interfaces with other domains such as design and heritage.

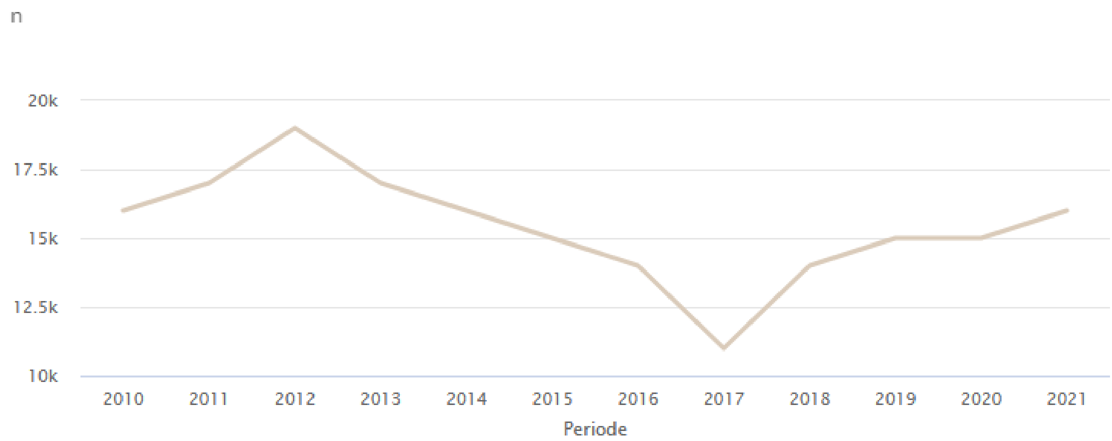

Figure 1. **Number of visual artists**
[Period]
Source: Statistics Netherlands (CBS) / ROA / CBS (*Monitor Kunstenaars en andere werkenden met een creatief beroep* [Monitor Artists and others working in creative professions])

There are enormous differences within the field of visual arts – not only between budding makers and international art stars, but also between the many institutions and levels of government involved in different forms of visual art. Based on a number of key themes, this analysis provides insight into the overarching developments that have taken place in this varied domain in recent years.

Artists and income

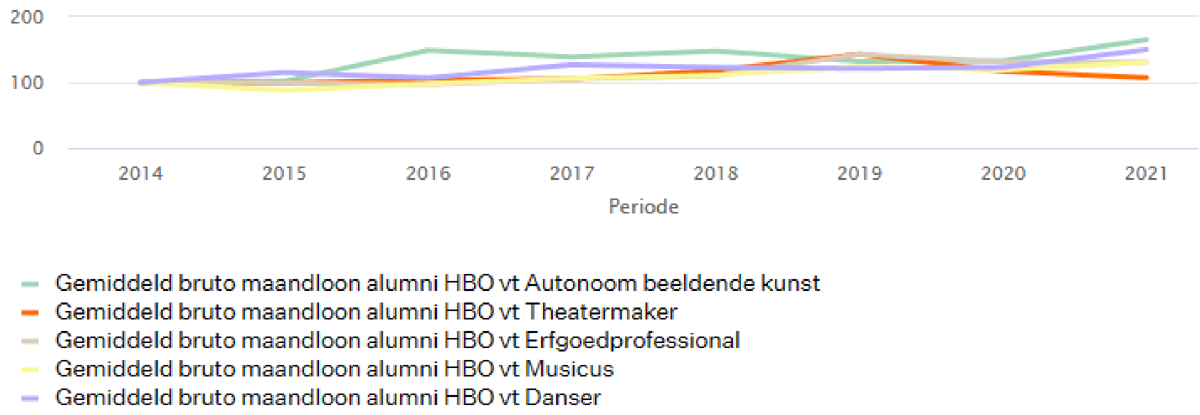

Figure 2. **Arts graduates' gross monthly salary**
Gross monthly salary of graduates of higher vocational education courses 18 months after graduation
(indexed: 2014=100)

[Period
Average gross monthly salary HBO graduate full-time autonomous visual arts maker
Average gross monthly salary HBO graduate full-time theatre professional
Average gross monthly salary HBO graduate full-time heritage professional
Average gross monthly salary HBO graduate full-time musician
Average gross monthly salary HBO graduate full-time dancer]

Source: Statistics Netherlands (CBS) / ROA / CBS (*Monitor Kunstenaars en andere werkenden met een creatief beroep* [Monitor Artists and others working in creative professions])

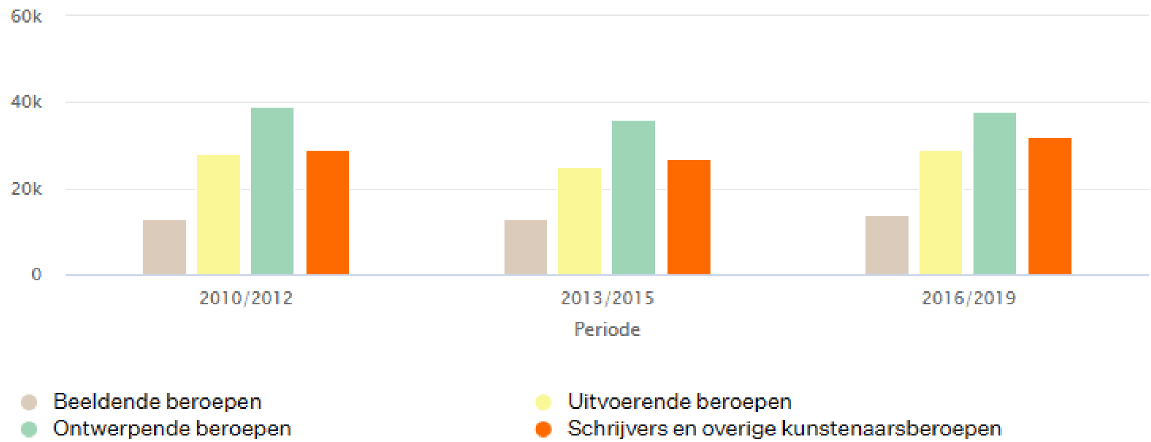

Figure 1. **Median personal gross annual income of artists**
[Period
Visual professions; Performing professions;
Design professions; Writers and other artistic professions]

Visual art museums during the pandemic

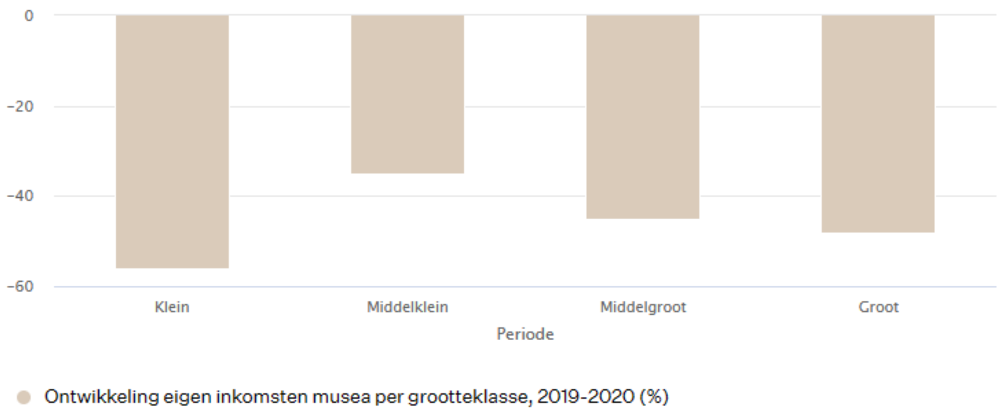

Figure 1. **Development of museums' own income by size class, 2019-2020**
[Small; Small to medium; Medium to large; Large]

Source: Museumvereniging [Museum Association] / Statistics Netherlands (CBS)

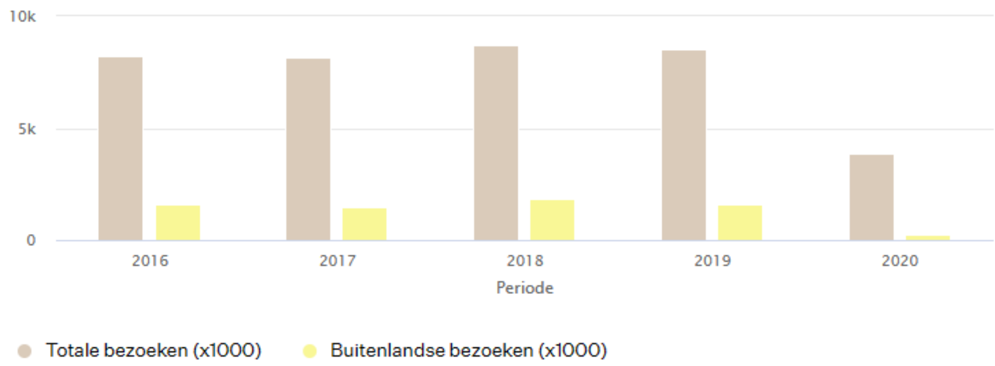

Figure 2. **Total visual-arts museum visits and visits by international visitors**
[Period; Total visitors (x 1000); Total international visitors (x 1000)]

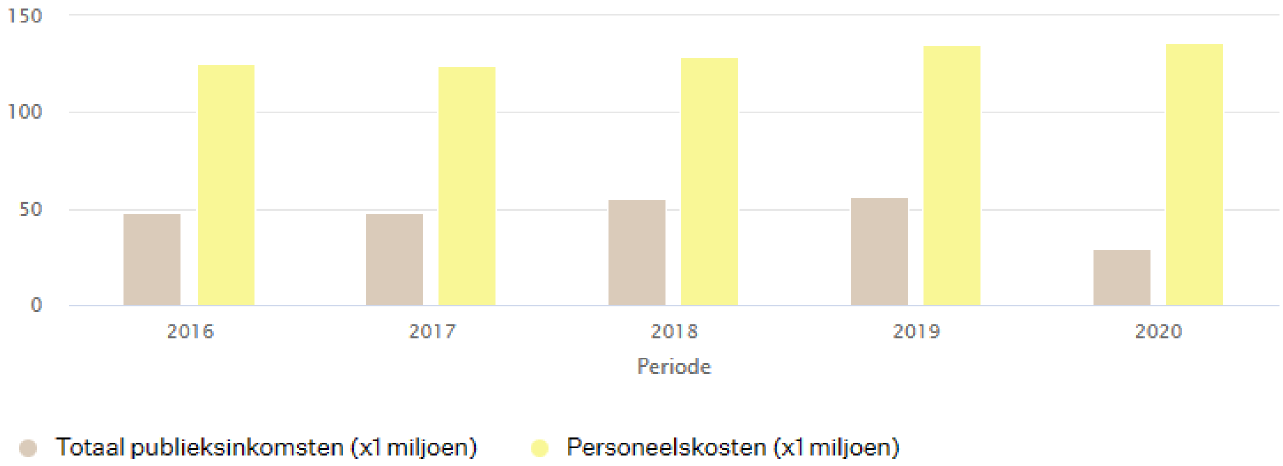

Figure 3. **Public income and personnel costs of visual-arts museums**
[Period; Total public income (x 1 million); Total personnel costs (x 1 million)]

2. TRENDS AND DEVELOPMENTS

A small group of artists and their position in the market

In the already precarious cultural labour market, the profession of visual artist appears to be an extra-vulnerable one. Visual artists have been a relatively small group among artists for years: between 2017 and 2019, the 13,000 visual artists formed just 8 per cent of the total group of artists in the Netherlands[107] (CBS 2021a). In 2021, graduates of full-time higher vocational education courses in autonomous visual arts earned an average of around 1,450 euros per month (gross), 18 months after graduating. For their colleagues who completed their full-time education in visual arts and design, the average earned was 2,203 euros per month. By way of comparison: the average of all full-time higher professional education programmes in the arts is 1,839 euros; that of all full-time higher professional education programmes is 2,533 euros (ROA 2022). Moreover, graduates of a visual arts course are less likely to find a job that fits their education. In the period 2014-2019, an average of 45 per cent of students of a bachelor's in fine arts found a position in their own or a related field of study after a year and a half. This figure is 75 per cent among bachelor's students who have been trained as teachers in this field. 90 per cent of all graduates of a higher vocational education programme find a job within 18 months that matches the programme (Ibid.).

Almost all of those who work as visual artists after graduating and fall within the definition of visual artist used by Statistics Netherlands work as self-employed people with no employees. For many, income does not increase much after the first 18 months. The median annual income of these self-employed people between 2017 and 2019, at 14,000 euros, is in line with the average monthly income a year and a half after graduation. This means that half earn more, and half earn less (CBS 2021). We are not yet able to provide a clear picture of the effects of the pandemic on

[107] It should be noted here that these are visual artists whose main profession is their visual work. Those who spend more time on other work and are visual artists in their so-called second job are not counted here.

this income. It is clear, however, that of those who fall within the SBI[108] category of 'writing and other creative arts' – which includes authors, composers and choreographers in addition to visual artists, for example – 52.2 per cent had to deal with a fall in turnover of an average of 55.1 per cent in 2021 compared to 2019. Although more of these artists (56.7 per cent) experienced a fall in turnover in 2020, this decrease was somewhat smaller (47.7 per cent).

Part of this income comes from institutions that exhibit visual art and pay visual artists for the work they create specifically for these exhibitions. The fact that it makes sense to pay for such work was not always obvious and often did not happen. This situation led to the creation of the Guideline for Artists' Fees in 2017. A recent evaluation of this guideline has made it clear that in the period 2018-2020 exhibition halls make the most applications for funding and that they embrace the guideline more than museums in terms of feasibility (Berenschot 2021).

Exhibition halls therefore seem to be closer to the daily practice of visual artists than museums. In terms of scale and turnover, exhibition halls are smaller than most museums, with smaller exhibition halls also being in the majority (Wolters et al. 2019). Most of the work here is performed by those that are self-employed without employees. The relationship between exhibition halls and self-employed people was also apparent during the pandemic. The smaller presentation institutions were among the few in the cultural and creative sector to spend more on the self-employed in 2020 than in 2019, with the help of coronavirus support funding (Goudriaan et al. 2021).

In addition to the strong relationship that the visual arts have with museums and, in particular, exhibition halls, the domain has long been closely associated with local policy. This becomes apparent, for example, when the income mix of museums for the visual arts is compared with that of other museums. This reveals that museums for the visual arts depend for a larger part of their income on municipal and provincial subsidies. Showing visual art also seems to be of growing importance to municipalities. In the financing of visual arts, the municipalities that receive money from the Decentralisatie-uitkering Beeldende Kunst & Vormgeving [Decentralization Grant for Visual Arts and Design] have for years been spending the largest part of this budget on museums (Vinkenburg et al. 2018). The share of exhibition halls is also increasing, but at 8 per cent this is nowhere near the 63 per cent received by museums for the visual arts (Ibid.). A local context is also important for the group of self-employed people within the visual arts. As noted in the *Monitor Creatieve Industrie* *[Creative Industries Monitor]*, the urban context in particular makes it possible for self-employed persons and small businesses to achieve a scale that they cannot achieve independently by working together (Rutten et al. 2020).

[108] SBI stands for standard business classification. The SBI is a hierarchical classification of economic activities. More information about the SBI can be found on the CBS website.

Museums' income mix

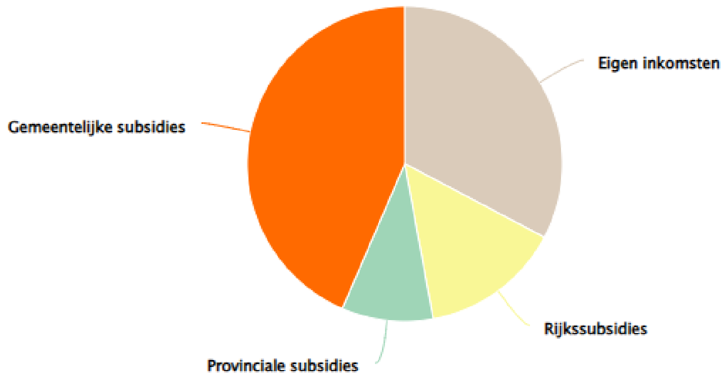

Figure 1. **Income mix of museums for visual arts 2020**
€ x 1,000,000
[Own income = 91; Municipal subsidies = 121; State grants = 40 ; Provincial grants = 26]
Source: Statistics Netherlands (CBS)

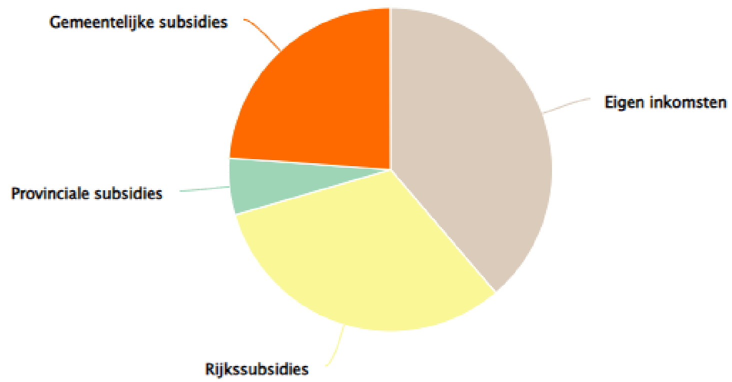

Figure 2**. Income mix of other museums 2020**
€ x 1,000,000
[Own income = 343; Municipal subsidies = 211; State grants = 281; Provincial grants = 50]
Source: Statistics Netherlands (CBS)

Huge inequality, but no lack of action

The global art market had been on the rise for years before the outbreak of the pandemic (Brom et al. 2019). In 2020, global growth came to an abrupt end: the art dealers' revenues fell by around 20 per cent (Art Basel et al. 2021). Art institutions and museums, meanwhile, had to close their doors for months. As a result, the visitor numbers of museums fell by 60 per cent. Museums' own income fell by 250 million euros – almost by half (Museumvereniging 2020). Visual art museums saw a decrease from 8.5 million visitors in 2019 to 3.9 million in 2020 (CBS 2022). Although visitor numbers seemed to be recovering somewhat since the summer of 2021, the Museums Association expected a decrease to have taken place over the whole of 2021: from 13.2 million museum visits in 2020 to 9.7 million in 2021 (Museumvereniging 2021). However, the global art market picked up in 2021. The decline in 2020 turns out to have been a one-off – in 2021 the value of the global art market will have been even greater than in 2019. The hope that the pandemic would level the playing field seems unfounded; an ever-smaller proportion of companies and artists still account for an increasingly bigger share of the turnover (McAndrew 2022). The fruits of global growth are therefore very unevenly distributed; the income mainly goes to a small group of celebrated artists, with beginning and mid-career artists often earning considerably less. Female artists, too, were still financially disadvantaged compared to their male colleagues (BKNL 2019). Nevertheless, there seems to be no shortage of initiatives to tackle inequality and to promote diversity and inclusion within the visual arts. Some focus primarily on engaging the public. For example, in recent years Studio i – an initiative of the Stedelijk and the Van Abbemuseum – has offered tools to make exhibitions accessible to visitors with a disability. The Van Abbemuseum is now also implementing these guidelines in its own collection. Other institutions are mainly concerned with the content of their exhibitions. The Rijksmuseum has been critically examining its permanent collection in recent exhibitions, and for some time now the Amsterdam Museum has been acquiring new collection items that can shed light on gender diversity. This trend seems to have continued in 2020. There is also considerable reflection on the language use in exhibitions. Various insights with regard to inclusive exhibition texts have been summarized in the Handreiking Waarden Voor Een Nieuwe Taal van Code Diversiteit & Inclusie, a handbook for a new language of diversity and inclusion (Samuel 2021).

The attention to inclusivity in work and programming indicates that the Visual Arts domain is increasingly reflecting on the inequalities that play a role within the domain – and society at large. Yet it is questionable whether this reflection ever translates into actual equality of opportunity, either in terms of income or influence. For example, the boards of various Dutch art museums that have been focusing on inclusion for years were, in 2020, still largely white, male and highly educated (Borg 2020). Not all demographic groups are equally represented in all segments of the sector (staff, audience, programming and partners). It is also questionable whether the position of women in the domain has improved sufficiently in recent years. According to the Amsterdam Fund for the Arts (AFK), women seem to be reasonably well represented among the staff of visual arts institutions, but in recent years they have been missing in managerial positions and as artists in the collections of large institutions, according to a survey by the broadcaster NOS (Nieuwsuur 2021). Female artists are also under-represented at art fairs, although one positive development is that their share is increasing. For example, the subsidies with which the Mondriaan Fund supports galleries which show Dutch artists in international art fairs went from 33 per cent for female artists in 2018 to 44 per cent in 2020. The fact that the global art market is organized as a competitive free market makes the situation even more complex. Art fairs reflect supply and demand – and as long as supply is still very unequal, that inequality will continue to be partly reflected in demand. More recently, an exploratory study into gender (in)equality in the art world has shown that women are strongly under-represented in various parts of the art world (Heithuis et al. 2022).

Male to female ratio at international fairs

This concerns the male to female ratio represented by galleries when participating in international fairs with the support of the Mondriaan Fund.

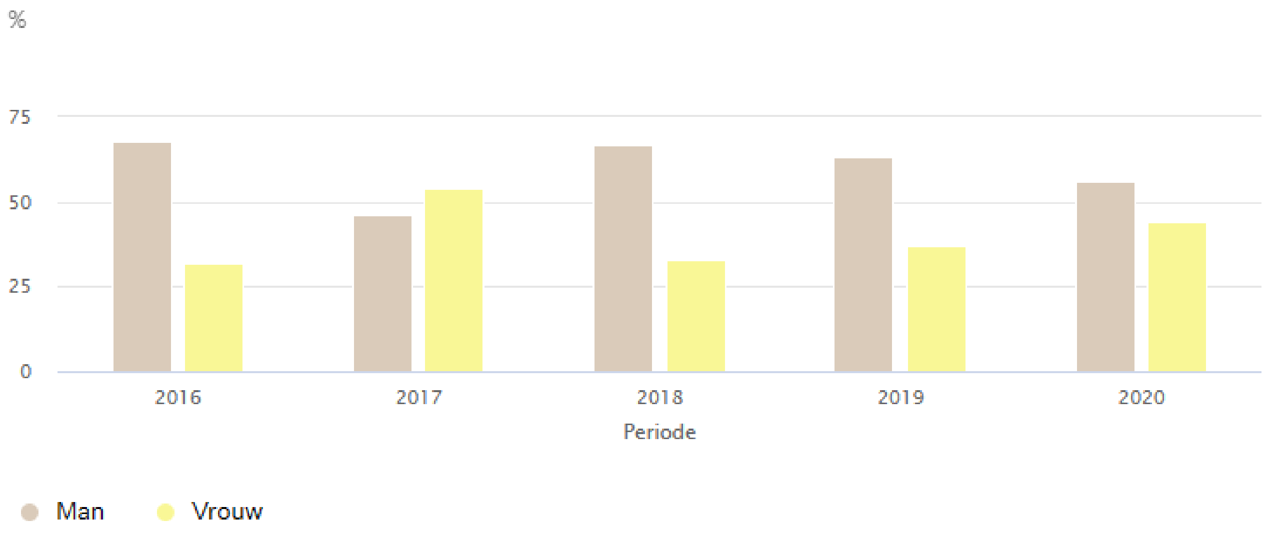

Figure 1. **Male to female ratio represented by Dutch galleries at international fairs**
[Period; Men; Women]
Source: Mondriaan Fund

In recent years, various institutions have tried to increase the pressure on persistent inequalities and to translate the increased focus on inclusiveness and diversity into structural, concrete change. For example, De Zaak Nu and Kunsten '92 presented Fair Care, a code of conduct and protocol. This addition to the Fair Practice Code could mean an important step towards safer, inclusive working atmospheres, based on clear guidelines. Since 2020, the Diversity & Inclusion Code has published various documents containing generally applicable guidelines on diversity (Samuel 2021). Because of the realization that the pandemic could negatively impact existing inequalities, various funds and institutions are making greater efforts to comply with the Fair Practice Code by offering more tools for this (Fair Practice Code 2020).

However, there are still major differences in the extent to which institutions deal effectively with diversity and inclusion. While some institutions are already making great strides towards more inclusive and diverse programming, staff, audiences and partners, other institutions do not always know where to start and see working towards diversity and inclusion as a major and complex task (Borg 2020). These differences show how complex it is (or feels) to translate broad guidelines on equity, diversity and inclusion into tailor-made solutions for each institution. What does diversity and inclusion mean at an institutional level? How can different institutions best interpret these concepts? Do existing collections need to be fundamentally adapted, or is a new, 'critical' reading sufficient? The diversity, equity and inclusion thematic report shows that a sector-wide approach for monitoring and collecting data on these themes is currently lacking. Is it possible to clearly measure the effect of different approaches, or can diversity and inclusion not be quantitatively comprehended? It seems that these questions will lead to many answers in the coming years, but it is clear at any rate that a thorough discussion about inequality, diversity and inclusion has now reached the visual arts. Moreover, inequality appears to encourage undesirable behaviour in various areas, many reports of which have recently arisen at Dutch art academies and in organizations for the visual arts (Leden 2022).

Reluctant audiences and loyal buyers

Data on visitor numbers – such as museum tickets sold and scanned annual museum cards – show that the public was not always able to find a way back to the art museums, even under the relaxed anti-coronavirus measures of the summer of 2021 (Leeuwen 2021). Although visitor numbers seem to recover in 2022, museum visits are generally still very low compared to the period before the pandemic (VTO 2020; Museumvereniging 2023; Leeuwen 2021). Moreover, it is difficult to give a complete picture of the public that is interested in visual arts. For example, many smaller exhibitions – such as those in cafés, music venues, or creative hubs – are still taking place under the radar. In addition, it is almost impossible to gain insight into the visitors of exhibitions that have no ticket office (Boekman Foundation 2019).

The absence of the public has major consequences for the financial position of museums and exhibition spaces. For many institutions, both public income and income from catering establishments and room rental have disappeared. Large and small museums in particular were affected; large museums had to do without a foreign audience, and small museums were relatively less eligible for support because they are more dependent on municipal funding, which draws on smaller budgets (Museumvereniging 2021). While personnel costs remained more or less the same, public revenues for museums with the 'visual arts' label used by the Mondriaan Fund fell from 56 million in 2019 to 29 million in 2020 (CBS 2022).

In the first place, this fall in revenue has an effect on programming: many institutions have to rely on their own collection due to reduced budgets and are avoiding the major risks associated with exhibiting work on loan (involving not only high costs, but potentially also travel restrictions as during the pandemic) (Uchelen 2020). Furthermore, a greater division seems to have arisen between institutions that were able to claim emergency support and those that have (several times) fallen by the wayside. The latter group has incurred large costs to comply with the anti-coronavirus measures but has not always received pandemic support to cover these costs. Small museums in particular have been hit hard: their own revenues fell by a total of 57 per cent between 2019 and 2021, with pandemic support compensating for about 31 per cent of this lost income. At the big museums, the decrease was 43 per cent and 62 per cent was compensated (Museumvereniging 2023). The fear mentioned earlier – that if the public fails to find the small institutions again, it is questionable whether they can keep their heads above water for long – therefore remains current (Museumvereniging 2021).

In contrast to the somewhat hesitant public, the art buyer seems to remain fairly loyal. More than 60 per cent of art fairs were cancelled in 2020 and the turnover from art sales worldwide fell by 22 per cent (Knol 2021). Yet the statistics do not indicate a major shift in the number of art buyers purchasing work through galleries or fairs (Jong et al. 2022). Many art buyers seem to have found their way back to the galleries since 2020 – both through digital viewing rooms and in real life (Nederlandse Galerie Associatie 2021). So far, no coronavirus-related bankruptcies have been reported at the Nederlandse Galerie Associatie [Dutch Gallery Association]. On the other hand, almost all galleries and fairs cut their workforce and received help from government support or emergency funds (Ibid.).

Digitization is gaining ground – but has its limits

In 2020, it was significantly more difficult to experience visual art on location. For many institutions, galleries and makers, a trip to the digital world offered a partial solution (Knol 2021). According to an internationally conducted survey by Art Basel, digitization was a top priority for 54 per cent of art sellers in 2020. A year earlier, only 19 per cent of sellers were concerned with it (Art Basel et al. 2021). Many galleries turned to digital promotional tools in 2020, and some sellers even experimented with online viewing rooms. Museums have also increasingly dipped their toes into digital waters over the past 18 months. Online tours, interactive websites and digitally available teaching materials are on the rise (Museumvereniging 2021). Although the pandemic was an additional reason for many institutions, galleries and makers to digitize further, visual art's shift to digital is not necessarily a new development (Robertson et al. 2010). But the influence of the digital world on the presentation and sale of visual art has accelerated due to the pandemic.

However, various signals seem to indicate that there are limits to these digital efforts in reaching the public. For example, during the pandemic, the first interaction of an art buyer with a work of art often still took place on location (Jong et al. 2022). The question is whether online viewing rooms can entice potential buyers in the same way as on-site exhibitions. It also remains difficult for exhibition spaces and museums to convert their digital offerings into income that can compensate for the loss of ticket sales. Nevertheless, museums could count on a significant increase in digital visitor numbers in 2020 after expanding their digital offerings (Museumvereniging 2021). Many art museums are therefore continuing to focus on a larger digital offering in order to expand their public reach, even under strict anti-coronavirus measures.

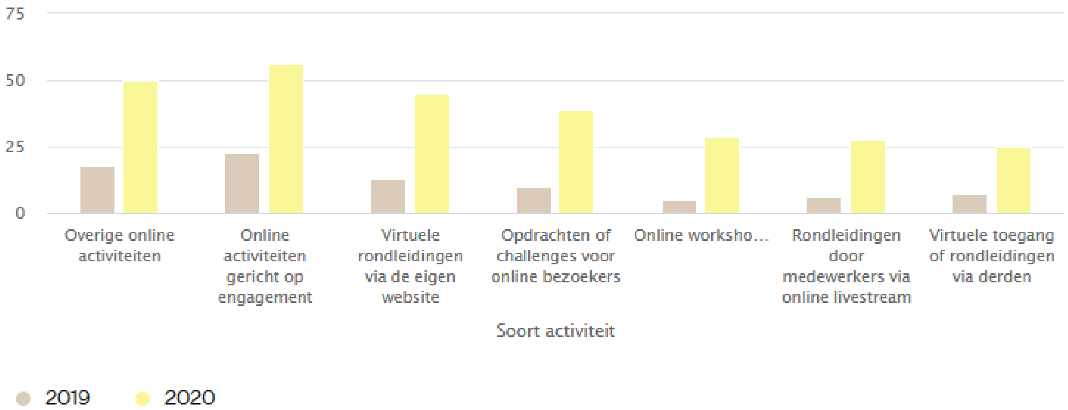

Figure 1. **Museums that organize online activities**
Shares of museums (%)
[Type of activities:
[Other online activities; Online activities aimed at engagement; Virtual tours via the museum website; Assignments or challenges for online visitors; Online workshops; Guided tours by staff via online live stream; Virtual access or tours via third parties]
Source: Museumcijfers [Museum Figures] 2020 / Art Market Report 2020

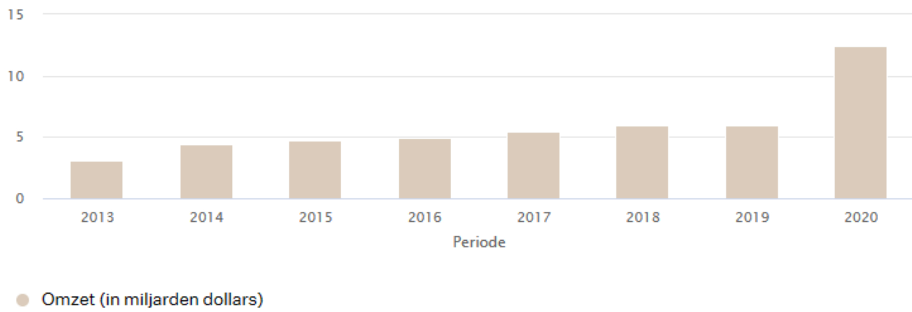

Figure 2. **Worldwide turnover of online art and antique sales, 2013-2020**
[Period; Revenue (in billions of dollars)]

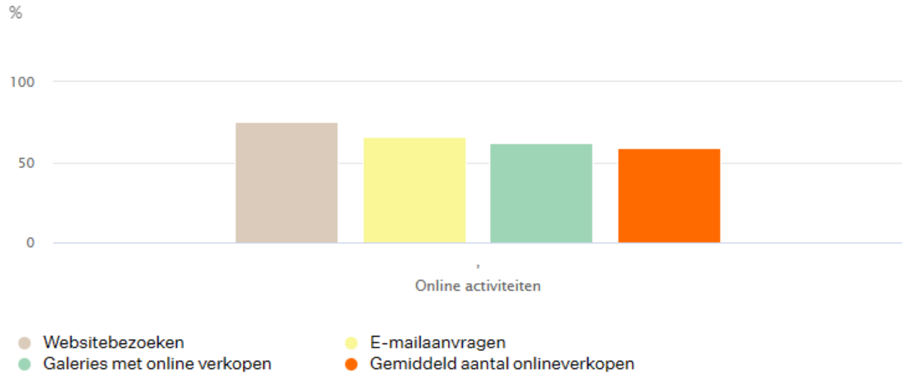

Figure 3. **Increase in global online art trade, March to December 2020**
[Online activities; Website visits; Email requests; Galleries with online sales; Average number of online sales]

3. WHAT ELSE WOULD WE LIKE TO KNOW ABOUT THE VISUAL ARTS?

New makers and institutions in the Visual Arts domain seem to be increasingly confronted by a high threshold. The high real-estate prices in urban areas and the great inequality within the domain have had a negative effect for years on the space available for new voices (Kraaijeveld 2019). The loss of public revenues and the unevenly distributed pandemic support seem to have only further limited this space. Small galleries, exhibition spaces and makers had a hard time during 2020 (Museumvereniging 2020). Various institutions indicate that they are facing an ageing visitor population. Are there enough facilities for new Dutch artists, galleries and institutions?

To gain more insight into this development, it is important to better examine the organizational forms that have emerged in the domain in recent years. For example, makers seem to be increasingly working together to join forces – in the form of collaborations around creative incubators, and also artists' collectives (Smallenburg 2021). What does the emergence of partnerships say about the position of the individual maker on the job market? And to what extent do partnerships overcome existing problems?

Another issue related to the ageing of the visual arts sector is the stability of money flows. Some institutions point out that within the current subsidy system there is little room for the sustainable development of young talent. An instrument is still needed to systematically measure the impact of subsidies and other resources on talent development over the long term. What is happening in the studios of subsidized makers? Which young institutions and makers are giving up – and why? And which young institutions and makers are successful?

Finally, this analysis shows that the coronavirus pandemic has had a variety of effects on the Visual Arts domain but has not caused a major shift. The biggest trends – an unstable and unequal job market, digitization, the question of whether there are sufficient subsidies and facilities to structurally maintain the domain and an increasing focus on diversity and inclusivity – were already present before the pandemic.

It therefore remains important to continue to monitor developments in the visual arts. After all, what do the many new directives, measures and reforms of recent years mean for the art practice? We are therefore exploring possibilities to continue the Collectieve[109] [Collective] Selfie, including a panel study to map out the individual practice of makers. In doing so, the Culture Monitor is helping to build a stable, sustainable basis for the Visual Arts domain.

4. WOULD YOU LIKE TO KNOW MORE ABOUT THE VISUAL ARTS DOMAIN?

View more data about the domain of visual arts in the Dashboard of the Culture Monitor.

More literature on the domain of visual arts can also be found in the Knowledge Base of the Boekman Foundation.

[109] The Collectieve Selfie is an initiative of BKNL in which data about the visual arts sector is collected and interpreted. More information can be found at the Mondriaan Fund.

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6. DISCUSSION PARTNERS

In 2021 we spoke to the following people when gathering information for the development of this domain page:

- Yvonne Franquinet (head of visual arts and heritage, AFK [Amsterdam Fund for the Arts])
- Janneke Visser (communication strategist, Museums Association)
- Philip de Jong (chairman, NGA [Dutch Galleries Association)
- Mark Grol (director, PAN Amsterdam)
- Sepp Eckenhaussen (co-director, Platform BK)

DOMAIN: AUDIO-VISUAL

On the Audio-Visual domain page, we present information about the distribution and consumption of (mainly) feature films in cinemas and on streaming services. Attention is also paid to audio-visual production. For the Audio-Visual domain, the Culture Monitor currently focuses mainly on the film sector. In the future, this domain will be further expanded by the addition of information about developments surrounding the Dutch broadcasting system.

Written by Sabine Zwart, Mariska van den Hove and Mutaleni Nadimi
Last update 15 August 2023

Exhibition Studio Job, Joris & Marieke in Kunsthal Rotterdam / Photography: Lisa Maatjens

SUMMARY

The coronavirus pandemic caused disruptions and shifts in the Audio-Visual domain. Turnover from cinemas fell sharply due to the mandatory closures. Major foreign films were postponed, as a result of which the market share of Dutch films increased. After the reopening of the cinemas, both the distribution and production processes caught up: postponed films were released or produced in a short period of time. In 2022, the cinema industry saw the dawn of a recovery. The number of cinema visits increased once more but remained well below pre-pandemic levels.

Streaming services, on the other hand, benefited from the lockdowns and saw even faster revenue growth than in previous years. This growth has several implications for the industry, including the discussion about reinvesting revenues in the industry and the high demand for new stories and talented screenwriters.

1. KEY FIGURES

Turnover

The following visualizations contain data on the turnover of the audio-visual sector in the Netherlands, the turnover of video on demand in the Netherlands, the number of feature films produced, the production value of Dutch feature films, visits to cinemas and film theatres, the number of cinema films released, and the share of Dutch films in the cinema.

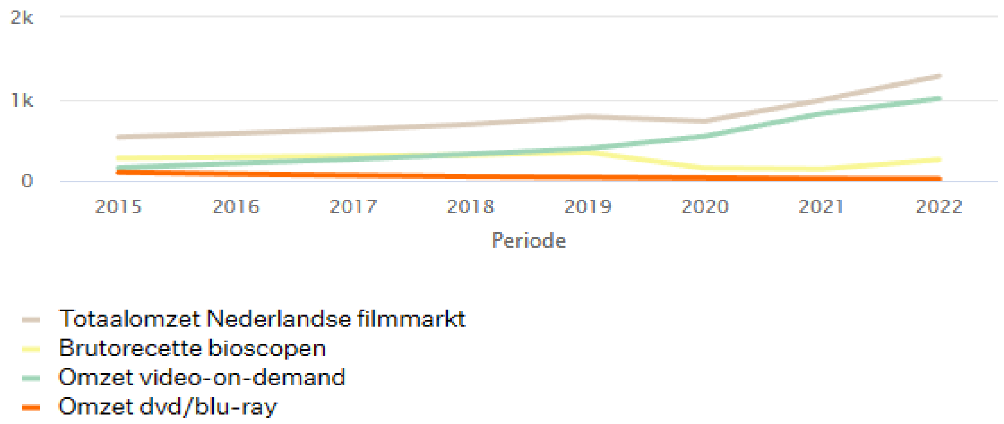

Figure 1. **Audio-visual sector turnover in the Netherlands, 2015-2022**
€ x 1,000,000
[Period
Total turnover of Dutch film market; Turnover of video on demand; Gross box office receipts; Turnover DVD/Blu-ray]
Source: Nederlands Filmfonds [Netherlands Film Fund]

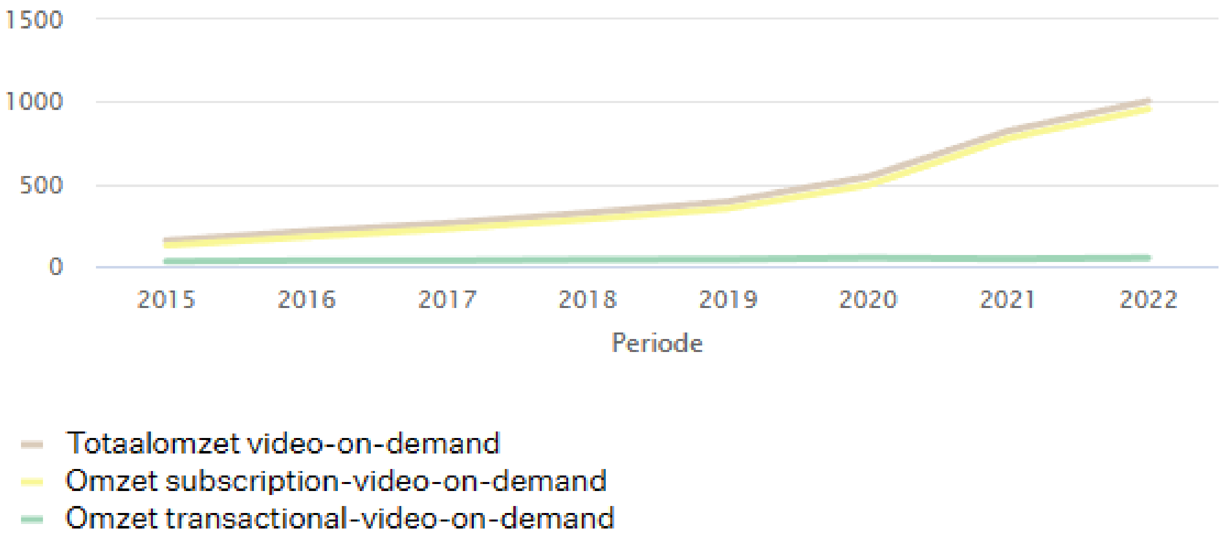

Figure 2. **Video-on-demand turnover in the Netherlands, 2015-2022**
€ x 1,000,000
[Total turnover video-on-demand; Turnover subscriptions video-on-demand; Turnover transactional video-on-demand]
Source: Nederlands Filmfonds [Netherlands Film Fund]

Production

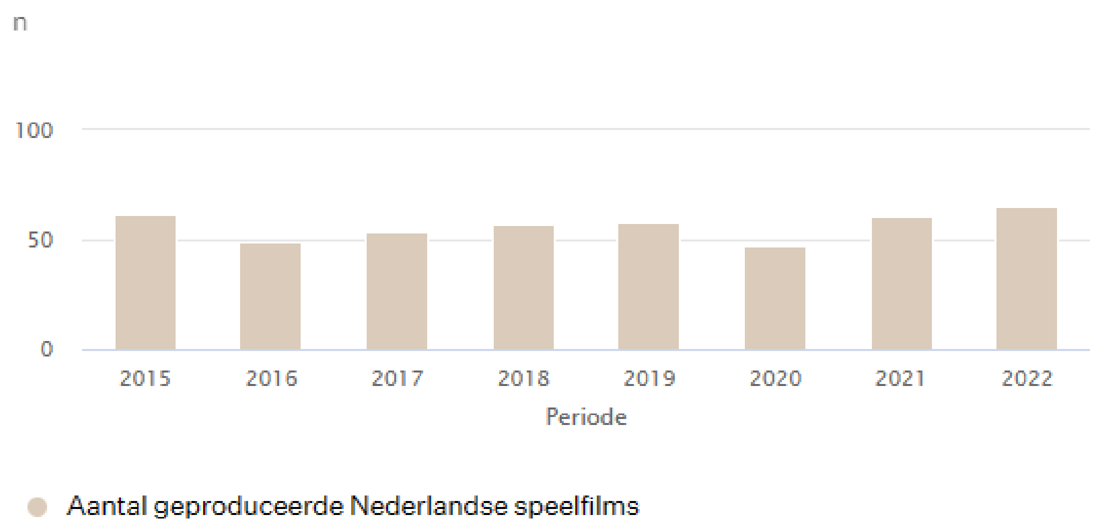

Figure 1. **Number of Dutch films produced (including minority co-productions), 2015-2022**
[Period; Number of Dutch feature films produced]
Source: Nederlands Filmfonds [Netherlands Film Fund]

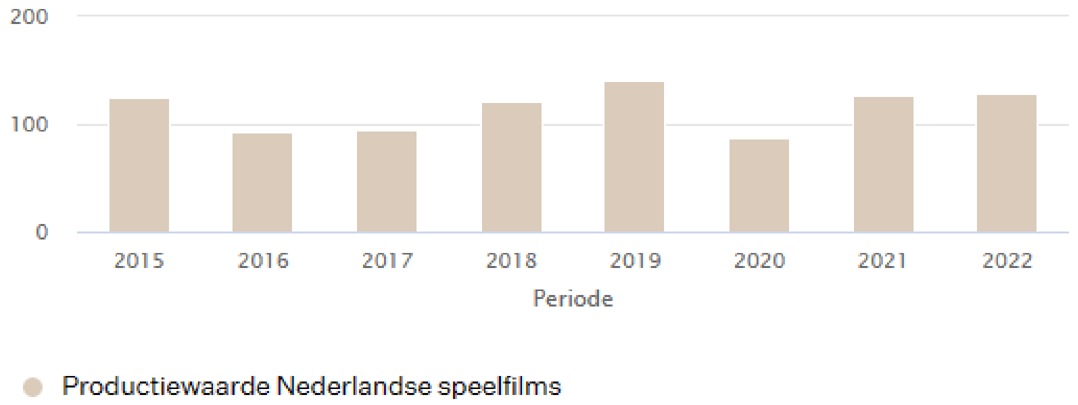

Figure 2. **Production value of Dutch films (including minority co-productions), 2015-2022**
€ x 1,000,000
[Period; Production value of Dutch feature films]
Source: Nederlands Filmfonds [Netherlands Film Fund]

Cinemas and movie theatres

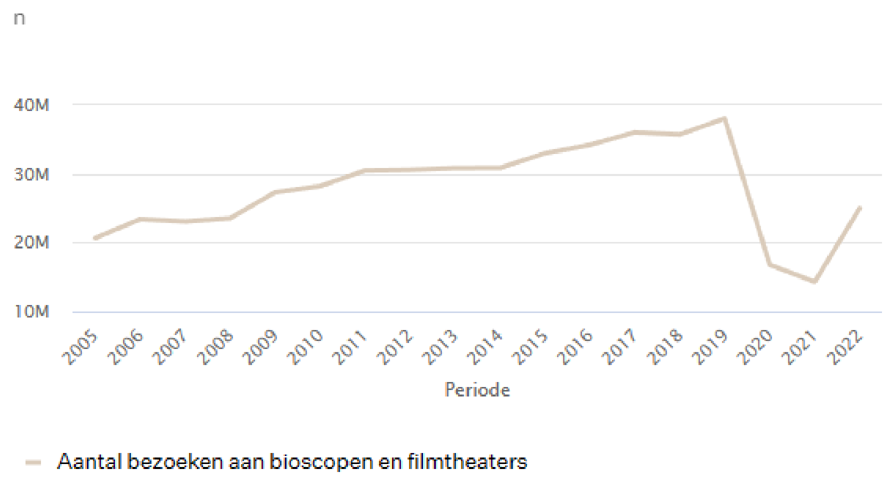

Figure 1. **Number of visits to Dutch cinemas and film theatres, 2015-2022**
[Period]
Source: NVBF (Dutch cinema/film theatre association)

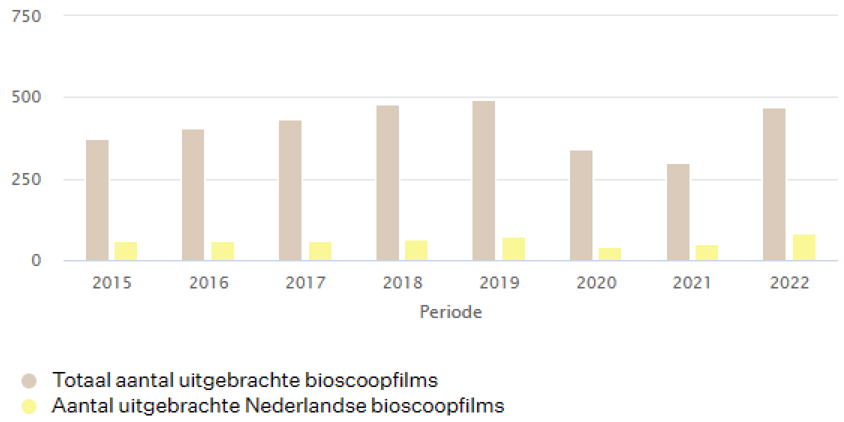

Figure 2. **Number of films released, 2015-2022**
[Period; Total number of cinema films released; Total number of Dutch cinema films released]
Source: NVBF (Dutch cinema/film theatre association)

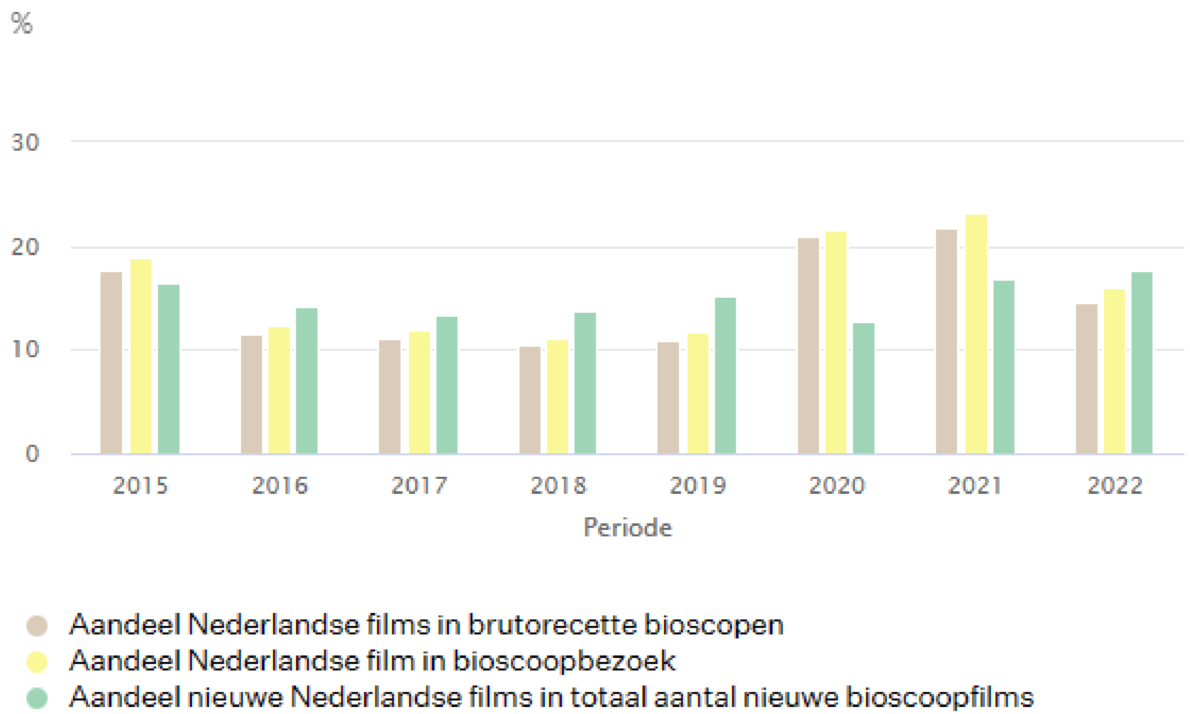

Figure 3. **Share of Dutch films, 2015-2022**
[Period;
Share of Dutch films in gross cinema receipts;
Share of Dutch film in cinema visits
Share of new Dutch films in the total number of new cinema films]
Source: NVBF (Dutch cinema/film theatre association)

2. TRENDS AND DEVELOPMENTS

The cinema industry: a boom time interrupted

The pandemic has slowed down certain trends in the audio-visual sector, while other developments have accelerated. An important starting point for an inventory is the Dutch cinema industry, which for some time has enjoyed an unprecedented period of prosperity. Since 2007, the number of visits to cinemas and film theatres[110] has increased almost every year: from 23 million visitors in 2007 to 38 million visitors in 2019 (see the figure 'Number of visits to Dutch cinemas and film theatres, 2005-2022'). In 2019, these visitors accounted for cinema receipts of no less than 347.6 million euros – the umpteenth record year in a row for the industry (see the figure 'Audio-visual sector turnover in the Netherlands, 2015-2021'.

Because of the pandemic, cinemas were closed for 15 weeks and 24 weeks respectively in 2020 and 2021. They also had to deal with limited capacity during most other weeks, due to the anti-coronavirus measures in force. It should therefore come as no surprise that this drastically suppressed the upward trends in

[110] 1 Henceforth 'cinemas' refers to both cinemas and film theatres, unless otherwise specified.

visits and revenues.[111] Total gross receipts in 2020 amounted to only 151.6 million euros, a reduction of over 56 per cent compared to the record year of 2019. In 2021, the number of cinema visits was 14.3 million and the gross receipts fell to 143 million euros. This makes 2021 the second worst year ever in terms of cinema visits since measurements began in 1918 (FDN and NVBF 2023b). Nevertheless, Dutch cinemas could count on an eager audience[112] between the two lockdowns of 2020 and 2021 (Blokland 2021, Dijksterhuis 2021a, Entertainment Business 2021).

In 2022, the cinema industry figures showed the beginning of a recovery. A total of 25 million visits were made to cinemas, an increase of 75 per cent on 2021. The total gross receipts amounted to 258 million euros, an increase of 81 per cent compared to 2021 (see the figures ‘Audio-visual sector turnover in the Netherlands’, and ‘Number of visits to Dutch cinemas and film theatres’). The increase in receipts was relatively stronger than the number of visits, because the average ticket price increased by about 3 per cent.

However, a comparison with the pre-pandemic years shows that there has not yet been a full recovery: the number of visits in 2022 was 32 per cent lower than the average from 2017 to 2019,[113] and gross receipts were 20 per cent lower. The sector hopes to continue the recovery trend in 2023, but with new challenges such as rising energy costs, the pre- pandemic level is not expected to be reached yet (FDN and NVBF 2023a).

Dutch films performed relatively well in both 2020 and 2021: partly due to the postponed premieres of blockbuster films from Hollywood, the share of Dutch films in cinema visits rose from 11.8 per cent in 2019 to 21.7 per cent in 2020 and 23.3 per cent in 2021. More foreign films were released again in 2022. Dutch films attracted fewer visitors in percentage terms than in 2020 and 2021, but still did relatively well[114] with a share of 16 per cent (see the figure ‘Share of Dutch films’). The most popular films were *Soof 3* (497,000 visits), *Bon Bini Holland 3* (440,000 visits) and *Costa!!* (261,000 visits).

The popularity of sequels is also reflected in the overall list of the most visited films of 2022, including foreign titles. As with the Dutch films, the top three consisted of sequels of previously released films: *Top Gun: Maverick* (1,265,568 visits) *Minions: Hoe Gru Superschurk Werd [The Rise of Gru]* (1,191,060 visits) and *Spider-Man: No Way Home* (950,802 visits) (FDN and NVBF 2023a). Such blockbusters are responsible for an increasing share of the number of cinema visits, a trend that has been apparent for a number of years (Dijksterhuis 2023).

Shifts in the production chain

In addition to a doubling of the share of Dutch films in cinema visits, the pandemic also brought about another temporary shift in the relationship between national and international. Because large media conglomerates, the so-called ‘majors’, withdrew their very expensive films in 2020, the ‘minors’ filled the gap in the cinema offer. Suddenly, in 2020, these independent distributors[115] had the same market share as the majors a year earlier (63.4 per cent versus

[111] For an extensive discussion of cinema visits in 2020 by various target groups, see the Bioscoop Monitor [Cinema Monitor] 2020 (Groot 2021).
[112] The James Bond movie *No Time To Die* that was released during this period even made it into the top five of the highest grossing films since 1992 (FDN and NVBF 2022b).
[113] In other countries, such as Spain, France and Germany, visitor numbers in 2022 were also well below pre-pandemic levels (FDN and NVBF 2023a, Huijsdens 2023).
[114] In the period 2015-2019, the share of Dutch films in cinema visits averaged 13.2 per cent, see also the figure ‘Share of Dutch films’).
[115] The independent distributor Dutch Filmworks, for example, saw its share quadruple and was the market leader in Dutch cinemas during the summer of 2020 (Beekman 2020).

63.7 per cent respectively) (Nederlands Filmfonds 2021a). In 2021, the market share of the minors in cinema visits had already fallen to 42.1 per cent. The majors once again largely control the distribution of cinema films (Nederlands Filmfonds 2022a).

After the reopening of Dutch cinemas, there was a pressing need for a place on the silver screen, something the sector was already anticipating at the end of 2020 (Busch 2020, Zwol 2021). In 2020 and 2021, 'only' 340 and 301 films respectively were released in the cinema in the Netherlands, compared to 492 in 2019. In 2022, the number of films released increased again, to 468 new titles (see the figure 'Number of films released'). (FDN and NVBF 2023a).
To prevent new Dutch films from drowning in this reservoir of unreleased films and to counterbalance the Hollywood marketing machine, the Nederlands Filmfonds [Netherlands Film Fund] launched special subsidy schemes in 2021 for both Dutch distributors and cinema operators. For example, a film distributor could apply for an additional contribution for release costs, while cinemas were eligible for a screening contribution of a maximum of 1 euro per paying visitor to a Dutch production (Nederlands Filmfonds 2021b, 2022b). In 2022, cinemas could also still use the so-called Full Circle schemes (Nederlands Filmfonds 2022c). These arrangements may have contributed to the number of Dutch films released reaching a record 83 premieres in 2022 (see the figure 'Number of films released') (FDN and NVBF 2023a).

Not only the distribution process was delayed. After all, in March 2020, the production of films also suddenly came to a standstill due to the pandemic. In order to restart work safely, the Dutch Audio-visual Producers Alliance (NAPA) and the NCP (association of Dutch content producers), in collaboration with the Dutch Academy for Film (DAFF), the public broadcaster and the commercial broadcasters, presented a Covid-19 protocol for the audio-visual sector. The protocol resulted from a sector-wide form of collectivity that was less present before the crisis (Wolfs 2021). The unity shown is, for example, something that the Council for Culture already insisted on in its recommendations for the sector advice *Zicht op zoveel meer [View of so much more]* (2018): "If we wanted to provide an unshakable foundation for the advice in this report, we would need just two words: work together!" (Raad voor Cultuur 2018, 74).

The relatively quick and well-organized resumption of production work may have ensured that the pandemic's impact on production volume was somewhat less than expected. In 2020, 47 feature films were produced, compared to an average of approximately 56 feature films per year in 2017, 2018 and 2019. At 87.1 million euros, the production value of these 47 feature films was considerably lower than in previous years: in 2017, In 2018 and 2019, films were produced for 94.2, 122.3 and 141.5 million euros respectively (see the figures 'Number of films produced' and 'Production value of Dutch films'). This difference is partly due to the fact that fewer films were shown in 2020 and that several above-averagely expensive[116] films were made in 2018 and 2019. However, the production budget also decreased on average:[117] from 2.11 million euros per film in

[116] These were in particular the majority co-productions *De Slag om de Schelde* (2019/14.21 million euros) and the minority co-productions *Benedetta* (2018/19.34 million euros) and *Waar is Anne Frank* (2019/15 .80 million euros). In comparison: the most expensive film of 2020 (the minority co-production *Blind Willow, Sleeping Woman*) had a budget of 5.42 million euros (Nederlands Filmfonds 2019, 2020).
[117] This refers to the average budget of Dutch productions, majority co-productions and minority co-productions. Excluding minority co-productions, the average budget of Dutch films fell from 1.81 million euros in the period 2017-2019 to 1.52 million euros in 2020 (Nederlands Filmfonds 2018, 2019, 2020, 2021a).

the period 2017-2019 to 1.85 million euros in 2020 (Nederlands Filmfonds 2018, 2019, 2020, 2021a).

While completed films jostle with each other in the cinema, postponed projects face quite a bit of competition in the Dutch production market. A major catch-up in the field of production has led to shortages on the job market, according to discussions with the audio-visual sector during the summer of 2021. In 2022, the number of Dutch feature films produced (including minority co-productions) further increased to 65, with a total production value of 129.05 million euros. Of these films, eight did not have a theatrical release (some of which were released on VOD, possibly due to the large number of Dutch releases maximizing theatrical capacity). Both the number of films and the total production value show an increase compared to 2021 (45 films, with a production value of 117 million euros) (Nederlands Filmfonds 2023).

Momentum in streaming-land

In 2022, SVOD (subscription video-on-demand) and TVOD (transactional video-on-demand) platforms together generated a record turnover of over 1 billion euros. SVOD platforms such as Netflix and Videoland (where you have access to all available titles through a subscription) and TVOD platforms such as Pathé Thuis or Picl (where you pay for access to specific films) contributed to this growth, which represents a 22% increase compared to the previous year's revenues of 822 million euros.

One TVOD service, Picl, works directly with cinemas and distributors and allows users to watch films at home while they are still being shown in cinemas. Users pay the price of a regular cinema ticket and have the option to 'donate' their access fee to affiliated cinemas. The majority of these revenues, approximately 955 million euros, came from the SVOD market (which also includes reality TV, sports and series). On the other hand, sales of DVDs and Blu-rays have been declining for years, and 2022 was no exception. Physical stores (with DVDs and Blu-rays) generated a total of 20 million euros, a decrease of 13% compared to 2021 (NVPI/FDN/GfK).

The number of video-on-demand (VOD) platforms available to Dutch audiences has increased in recent years. In total, 55 TVOD and SVOD platforms are available (including catch-up platforms, where viewers can watch previously aired content, such as Uitzending Gemist, NPO Start and NL Ziet). In 2022, three major VOD platforms were launched in the Netherlands: HBO Max, Viaplay and SkyShowtime. Although specific figures aren't published, the Nederlands Filmfonds points out that the overall growth in the number of subscribers to VOD services is slowing down.

According to Filmdistributeurs Nederland's VOD Monitor, 73% of Dutch households used VOD platforms in the last quarter of 2022, a percentage almost identical to the same period in 2021 (72%). Netflix remains the most used SVOD platform in the Netherlands. Among Dutch households, 63% reported using Netflix in the last quarter of 2022. When it comes to watching Dutch movies, Videoland offers the largest selection and is the second most used service after Netflix.

In terms of paying users, Netflix had 3.2 million subscribers at the end of 2021, followed by Videoland (1.3 million) and Disney+ (1.1 million). None of the platforms show a significant increase or decrease in subscribers compared to 2021. The most popular TVOD platform in the Netherlands is Pathé Thuis: 11% of households say they use this platform to rent or buy films online (VOD Monitor, FDN and Nederlands Filmfonds).

Exclusive content[118] plays a key role in the battle for streaming subscribers. Another strategy is to join forces, as in 2021 when the media companies RTL Nederland and Talpa Network announced their intention to merge in order to gain a stronger competitive position against international rivals. However, the merger was ultimately unsuccessful.[119] Finally, streaming services also compete on subscription prices. In order to offer and maintain a low price, Netflix, Disney+, HBO Max and Discovery Plus offer the option of an ad-supported subscription in some countries, which is cheaper than an ad-free subscription.

First steps towards financial circularity

Because video on demand has generated more than half a billion euros in turnover in the Netherlands since 2020, the discussion about financial circularity in the production chain has become even more urgent. A hot topic within the audio-visual sector is the skewed distribution of income: revenues mainly flow to end operators such as streaming services and cinemas, while they contribute little[120] to development and production in the Netherlands. In the policy plans for 2013-2016, the Nederlands Filmfonds already pointed out the need to rectify this, which was endorsed in the years that followed by, among others, the Council for Culture (Nederlands Filmfonds 2012, Raad voor Culture 2018, Rutten 2019, Reijn et al. al. 2019).

Since July 2022, there has been a long-awaited bill to stimulate financial circularity. State Secretary Gunay Uslu (Culture and Media) wants to oblige streaming services with an annual turnover in the Netherlands of more than 30 million euros to invest 4.5 per cent of that turnover in Dutch films, series and documentaries. To guarantee that this benefits the “Dutch cultural audio-visual product”, the bill formulates four language and culture criteria: the main language of the main characters is Dutch or Frisian; the screenplay is written in Dutch or Frisian; it is a film adaptation of an original Dutch or Frisian literary work; and the main theme is Dutch society (in a broad sense), culture, politics or history. Productions in which streaming services invest must meet at least two of the four criteria (Uslu 2022a).

Together with the legislative proposal, a final report with building blocks for a sector plan was also published, compiled by a working group consisting of representatives of all actors in the production and exploitation chain. The report contains recommendations for the sector itself and for the government, based on the joint ambition to appeal to the largest possible audience in the Netherlands with a diverse, high-quality audio-visual offering. It is also significant that this working group has initiated a dialogue between the various links in the chain.

Joining forces and encouraging both public funders and market players to invest in promising new projects will strengthen the film sector in the Netherlands. Encouraging collaboration between streaming services and the Dutch film industry can contribute to

[118] The Games domain report discusses a similar trend. The emergence of subscription services is also leading to a great need for new and exclusive content within the game industry, partly as a result of which several major mergers and acquisitions have already taken place.

[119] The Netherlands Authority for Consumers and Markets (ACM)[https://www.acm.nl/en/publications/acm-definitively-blocks-acquisition-media-company-talpa-rival-company-rtl], blocked the acquisition of Talpa by RTL as it would have created an excessively dominant company in the media sector.

[120] The VAT covenant (an agreement between the Ministry of Education, Culture and Science, the Netherlands Film Fund, EYE, NVBF and FDN) stipulates that Dutch cinemas and distributors invest in Dutch films in exchange for a low VAT rate. For each paying cinema visitor, 0.15 euros is therefore paid to the Abraham Tuschinski Fund.

more opportunities for innovative projects and growth in the film sector.

3. WHAT ELSE WOULD WE LIKE TO KNOW ABOUT THE AUDIO-VISUAL DOMAIN?

There is limited data available about the biggest players: the streaming services. The turnover of VOD in the Netherlands is estimated annually by the Nederlands Filmfonds because the vast majority of streaming services do not publish such figures. A concrete comparison between, for example, the market share of Dutch titles in the cinema and Dutch titles on the largest VOD platforms is also impossible due to the lack of data. In addition, according to the European Audio-Visual Media Services Directive, the catalogues of streaming services must contain at least 30 per cent European titles, which also necessitates data transparency in this area.

In addition to the trends and developments described, it is important to keep an eye on the shift from 'the traditional window', which refers to the time between the premiere in the cinema and distribution via, for example, streaming services. In 2020, this window was drastically shortened or completely abandoned due to the pandemic, so that some films appeared earlier or even immediately on VOD platforms. In 2021 too, cinemas could show certain films exclusively for less time, which means that the traditional window seems to be a thing of the past[121] (Faughnder 2020, Clark 2021). A new model could perhaps emerge from the collaboration between Netflix and a number of major cinema chains in various countries, including the United States, with the release of the film *Glass Onion: A Knives Out Mystery* in 2022. Cinemas were allowed to screen this new film for a week, followed by the premiere on Netflix a month later (Dijksterhuis 2022b).

The changing distribution flow has major implications for professional practice. Not for nothing did actor Scarlett Johansson sue the Disney film company when her superhero movie *Black Widow* appeared in the cinema *and* on the streaming platform Disney+ on the same day, perhaps negatively impacting her income. Because, while income from cinema revenues is contractually fixed and flows back into the value chain, VOD platforms usually work with a fixed rate (Keck 2021). For example, the Dutch protagonists of the Netflix hit series *Undercover* do not benefit financially from its success, because there are (as yet) no legal agreements[122] on this (Waaijers 2021).

Other developments to monitor are related to public broadcasting, the part of the sector to which more attention will be paid in future updates of the Audio-Visual domain. To strengthen the production and visibility of Dutch films, for example, agreements are also made between the Dutch public broadcaster NPO and independent film producers. Eighteen feature films are produced in this way every year, co-financed by the Nederlands Filmfonds and the NPO. These feature films will be available exclusively through the NPO for three years, starting eight months at the latest after their cinema premiere (Uslu 2022b).

[121] This specifically concerns the duration of 'the traditional window'. The period in which films are shown exclusively in cinemas has become shorter on average than before the pandemic, but the window itself seems to have remained intact (Huijsdens 2022, Westerhuis et al. 2021).

[122] Important in this context is the transparency obligation that has been included in the Auteurswet [Copyright Act] since 7 June 2022. On this basis, end operators such as streaming services are obliged to provide audiovisual creators with insight into the results of their work, including the revenue generated.

4. WOULD YOU LIKE TO KNOW MORE ABOUT THE AUDIO-VISUAL DOMAIN?

View more data about the Audio-Visual domain in the dashboard of the Culture Monitor.

More literature on the Audio-visual domain can also be found in the knowledge base of the Boekman Foundation.

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6. DISCUSSION PARTNERS

In 2021 we spoke to the following people when gathering information for the development of this domain page:

- Doreen Boonekamp (independent consultant)
- Joan Chan (team manager data analysis and research, Videoland)
- Amira Duynhouwer (board member, Network Scenarioschrijvers [Screenwriters' Nework])
- Raymond Frenken (policy officer, Netherlands Audiovisual Producers Alliance, NAPA)
- Dana Linssen (planner, FilmForward)
- Jonathan Mees (communication manager publication and research, Nederlands Filmfonds)
- Anna Pedroli (director, Netherlands Audiovisual Producers Alliance, NAPA)

DOMAIN: ARCHITECTURE

The Architecture domain page primarily presents figures on the job market and discusses developments such as the role of the architect in times of transition and the fragmentation of the professional group. The Architecture domain encompasses four disciplines: architecture, urban planning, interior architecture, and garden and landscape architecture. Alongside the Design domain, Architecture falls within the broader design sector, as mentioned on the Design domain page.

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Last update 24 December 2022

Depot Boijmans Van Beuningen / Photography: Lisa Maatjens

SUMMARY

Architects and spatial designers are increasingly seen as experts in addressing social and environmental issues and play a crucial role in achieving changes such as climate adaptation. However, this shift towards problem-based approaches naturally changes the architect's role within the field. Additionally, the increasing fragmentation of the job market has led to a significant growth in the number of self-employed professionals, making the position of independent architects vulnerable. Larger firms are better equipped to handle financial risks, allowing them to participate more frequently in public tenders. When examining gender ratios in the architecture sector, women are usually in the minority. And internationally the Netherlands fares poorly in this regard. Nevertheless, women are a growing presence in architecture-related education, and initiatives to make the sector more inclusive are becoming visible.

1. INTRODUCTION AND KEY FIGURES

In policy terms, architecture is part of the wider design sector, which also includes design and digital culture, as well as part of the cultural and creative industries.[123] It is also worth mentioning that the titles of architect, urban planner, interior architect and garden and landscape architect are all protected by the Dutch Architects Title Act (1987).

Money flows

The following three visualization contain data on (1) architects' turnover, (2) the distribution of client types of members of the Royal Institute of Dutch Architects (BNA), and (3) the average hourly wage earned by architects.

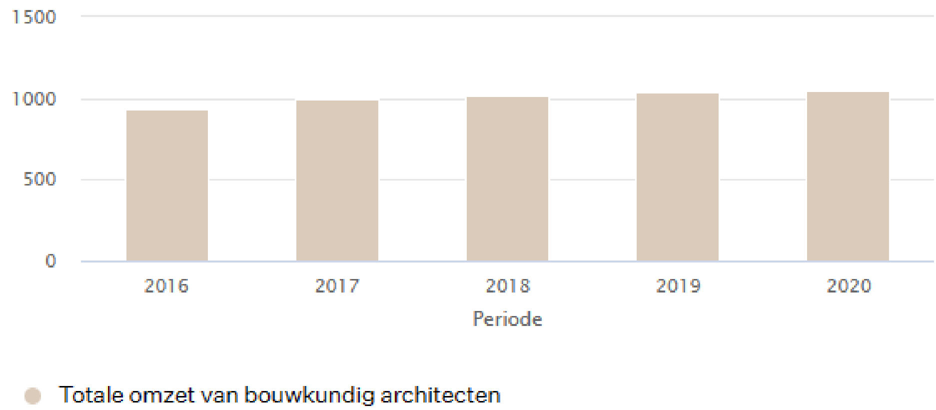


Figure 1. **Architects' turnover, 2016-2020**
€ x 1,000,000
[Period; Total turnover of architects]
Source: Statistics Netherlands (CBS) and Royal Institute of Dutch Architects (BNA)

[123] The Ministry of Education, Culture and Science (OCW) uses the term 'creative industries' for the disciplines of architecture, design and digital culture. The Creative Industries Fund NL also refers to 'designing disciplines', while the Council for Culture refers to the same three disciplines as the 'design sector'.

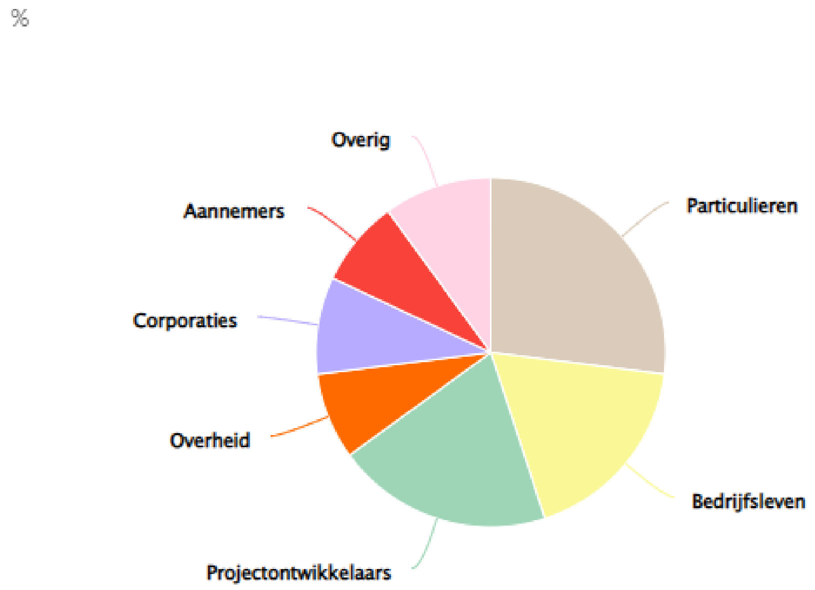


Figure 2. **Architects' clients, 2019**
[Other; Contractors; Corporations; Government; Property developers; Business; Private individuals]

Source: Statistics Netherlands (CBS) and Royal Institute of Dutch Architects (BNA)

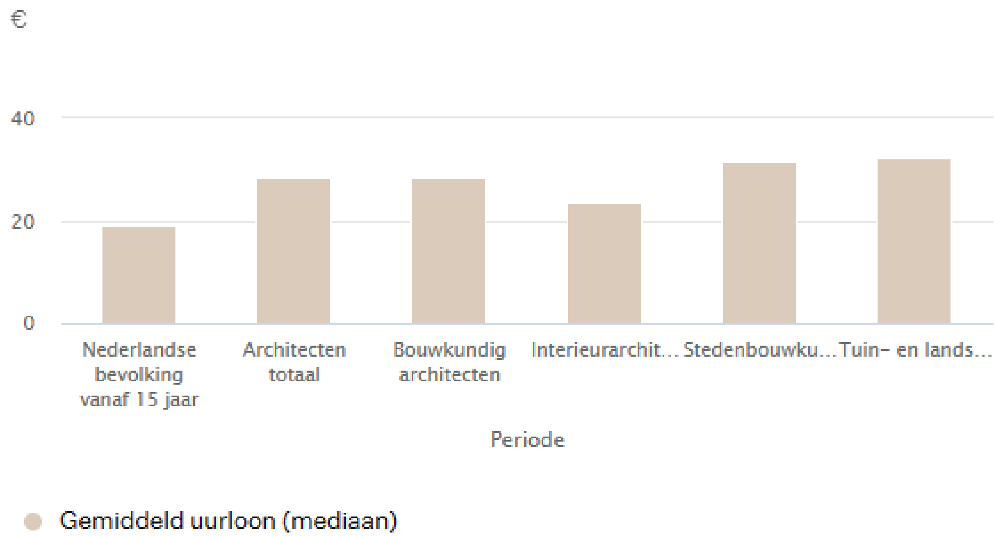


Figure 3. **Architects' average hourly wage, 2018**
[Dutch population aged 15 and above; All architects; Architects; Interior architects; Urban planners; Garden and landscape architects

Source: Statistics Netherlands (CBS) and Royal Institute of Dutch Architects (BNA)

Creative Industries Fund NL subsidies

The following visualizations contains data on (1) the subsidies for architecture from the Creative Industries Fund NL and (2) the distribution of subsidies from the Creative Industries Fund per discipline.

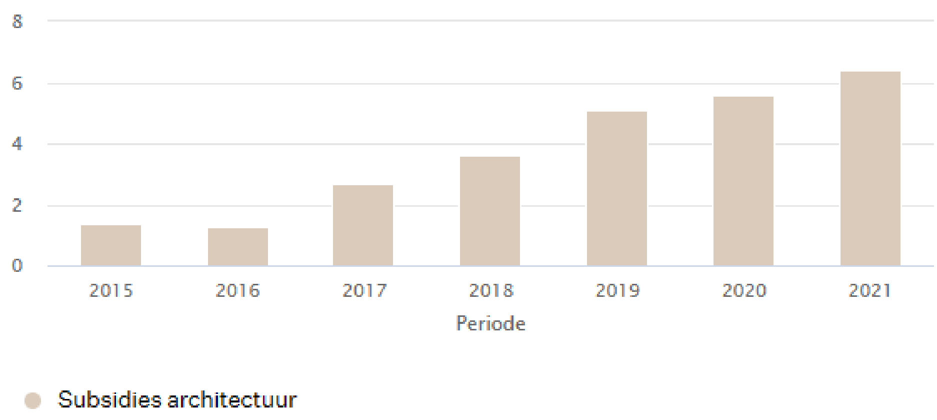
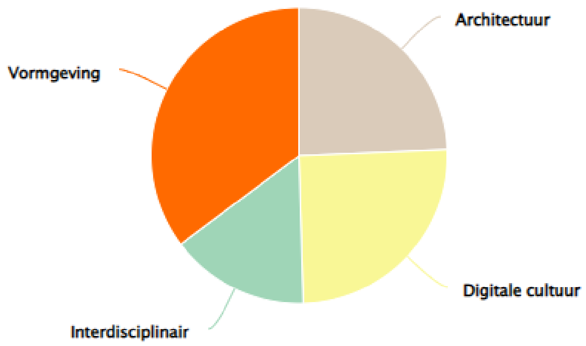


Figure 1. **Creative Industries Fund NL subsidies: Architecture, 2015-2021**
€ x 1,000,000
[Period; Architecture subsidies]
Source: Creative Industries Fund NL



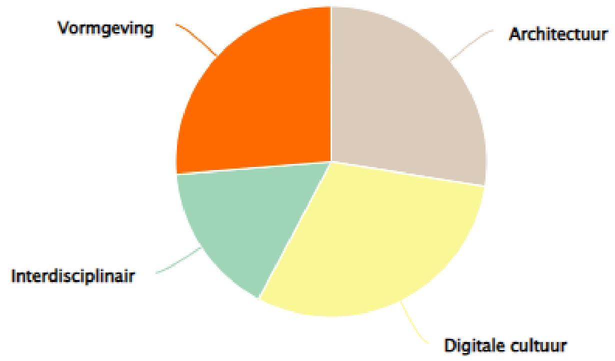


Figure 2 & 3. **Creative Industries Fund NL subsidies: Distribution, 2020 & 2023**
€ x 1,000,000
[Design; Interdisciplinary; Digital culture; Architecture]
Source: Creative Industries Fund NL

2. TRENDS AND DEVELOPMENTS

Architecture in transition: of sustainable importance

The spatial design of our living environment is inherently connected to social and societal questions. How can we ensure that our building culture aligns with a sustainable future? How can and should architecture contribute to urgent transition challenges such as nitrogen emissions, the development of a circular economy, or the housing shortage? How does a new project comply with such building requirements as Milieu Prestatie Gebouwen [Building Environmental Performance] or MPG, and Bijna Energieneutrale Gebouwen [Nearly Zero-Energy Buildings] or BENG?[124] Additionally, how do we address inclusivity in public spaces and the diversity of the city during the sector's recovery after nearly three years of the COVID-19 pandemic?

Architects and designers of the spatial environment are increasingly presented as experts in the field of change. In the 2021 annual report on the spatial design sector, *De ruimtelijke ontwerpsector ontleed*, architects are seen as "socio-spatial problem solvers",[125] a term coined by architecture professor Flora Samuel (Kempen et al. 2021, 20). In the foreword to *Ontwerp verbindt*, the action programme for spatial design 2021-2024, ministers Kajsa Ollongren and Ingrid van Engelshoven state that architects, urban planners, and landscape architects are instrumental in ensuring the success of initiatives such as climate adaptation and the transition to circular agriculture (BZK and OCW 2020, 3).

Not only is design crucial in this regard, but research through design also plays a significant role: the joint imagining of the future and spatial interventions through research and experimentation (Stimuleringsfonds Creatieve Industrie 2020). For example, the City of the Future project has developed a new conceptual framework and vocabulary for the redevelopment of Utrecht's eastern urban fringe. After all, how can the city of the future be designed if we adhere strictly to existing paradigms? The Spatial Design Action Programme of the Creative Industries Fund NL for the period 2021-2024 also provides scope for such research by design, in order to address extensive transitional processes and improve the spatial quality of the Netherlands.

Transition tasks are also evident in the current range of architecture and its valuation. The Royal Institute of Dutch Architects (BNA) organizes an annual competition to determine the best building of the year, which pays significant attention to sustainability and climate. In 2022, for example, Museum Singer Laren was voted best building by both a professional jury and public voters and praised for the reuse of existing building elements which seamlessly incorporated hidden solar panels, imperceptible to passers-by (Hannema 2022). The rules of the competition now also state that buildings that excel in sustainability or circularity gain an advantage with the expert jury.

An example at the international level is the New European Bauhaus (NEB) initiative,

[124] Since 1 January 2021, permit applications for all new buildings must meet the requirements for nearly zero-energy buildings (BENG). The energy performance is determined on the basis of three requirements: the maximum energy requirement, the maximum primary fossil energy consumption and the minimum share of renewable energy.

[125] The annual reports come from the Government Architect together with the Dutch branch and professional organizations for spatial designers, the Bureau Architectenregister, the Creative Industries Fund NL and the Stichting Fonds Architectenbureaus.

launched by the European Commission in January 2021. Its aim is to give substance to the European Green Deal in a cultural, sustainable and inclusive way. The Green Deal comprises a series of policy initiatives across all sectors with the aim of achieving climate neutrality in Europe by 2050.

The NEB serves as an interdisciplinary platform that fosters collaboration among artists, designers, engineers, scientists, entrepreneurs, architects, students and other interested participants encouraging them to share ideas for a sustainable transition. Cash prizes are awarded to support the further development of these ideas. In addition, the NEB aspires to have citizens, experts, companies and institutions discuss future-proof living environments with each other.

Closer to society

The new Environment and Planning Act – which comes into force on 1 January 2024 – also aims at greater cooperation between citizens, businesses and civil society organizations at national level. The idea is that spatial projects will be closer to society and that participation within projects will be promoted. An example of such a collaboration is the Berlijnplein in Utrecht, a new public space being developed by BOOM Landscape as a co-creation with residents, which will be completed in 2025.

This is in line with the emergence and importance of so-called 'citymakers'. Residents take matters into their own hands and think for themselves about how their living environment can be improved. Citymakers act as a link between citizens and municipalities, facilitating the connection of diverse wishes. As the Council for Culture describes it: "The trend (...) requires a new role for designers. In addition to being initiators, they are often directors, developers and connectors in these types of processes" (Raad voor Cultuur 2018, 14).

Assignments, selection procedures and exclusion

How do architects get their assignments? In addition to direct orders from clients, architects acquire new orders through tender processes. Architects and firms can register for an assignment, after which the client selects the contractor from the total number of registrations.

It is striking that the enthusiasm for participation in such selection procedures has decreased among small-scale agencies and independent designers (Atelier Rijksbouwmeester et al. 2020). This is because although clients are legally obliged to offer reasonable compensation for tender costs – covering the expenses incurred to submit a tender bid – this is not always in proportion to the efforts required by potential contractors.

Bigger firms are better equipped to withstand the financial risks associated with selection procedures, which means that they can, and do, participate more frequently in tenders (Atelier Rijksbouwmeester et al. 2020; Koetsenruijter and Kloosterman 2018; Rutten et al. 2019). Research by the Royal Institute of Dutch Architects (BNA) shows that, in 2021, about 88 per cent of the largest architectural firms (with more than 40 full-time equivalent staff) participated in selections, while only 8 per cent of the smallest firms (up to 5 full-time equivalent staff) took part. The most important reasons for never, or only occasionally, participating in selections are the small chance of winning the assignment and the substantial costs and requirements (BNA 2022a).

In the discussions with the sector that were held for this domain page, the above is seen as a certain form of exclusion. For example, clients setting high standards for the contractor's portfolio means that small offices find it more difficult to qualify in the first place. To improve procurement practice, an amendment to the Dutch Aanbestedingswet [Public Procurement Act] is being examined and the application of the Handreiking Tenderkostenvergoeding [Tender Cost Reimbursement Guide] (BNA 2022a) is being evaluated. The Creative Industries Fund NL is also making various resources available to smaller architectural firms for development, for example through the Architecture Grant Scheme and in the new Spatial Design Action Programme.

Fragmented professional group and the rise of freelancers

When we examine the relationship between clients and contractors beyond the job market, it becomes evident that the architecture sector has experienced increased fragmentation due to downsizing. This fragmentation is a result of the financial crisis in 2008, which saw turnover of the architectural sector fall from more than 1.6 billion euros to 725 million euros in 2012 (Heebels and Kloosterman 2016; Raad voor Cultuur 2018). As a result, a large wave of redundancies has reduced existing firms to one-person companies, while unemployed architects have started their own businesses (Koetsenruijter and Kloosterman 2018). The increase in self-employed people within the sector is therefore considerable: from 19.5 per cent self-employed[126] in 2010 to almost 32.2 per cent in 2018 (Kempen et al. 2021).

The job market

The following visualizations contain data on (1) the number of registrations with the Architects Registration Bureau (BA) per subdiscipline, (2) the number of jobs for employees and the number of self-employed at architectural firms, and (3) the number of architectural firms.

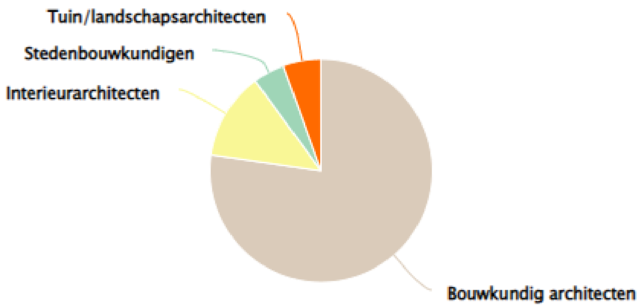


Figure 1. **Architects, by subdiscipline**
[Garden/landscape architects (625); Urban planners (120); Interior architects (1,430); Architects (8,775)]
Source: Statistics Netherlands (CBS) and Architects Registration Bureau (BA)

[126] The growing number of self-employed people is not unique to the architecture sector, but is a trend that is also clearly visible in the cultural and creative sector as a whole. For example, 72 per cent of workers in the art sector were self-employed in 2017 – compared to 12 per cent of the entire working population. For more information, see page 14 in the SEO report Karakteristieken en tarieven zzp-ers [Characteristics and rates of self-employed people] (2018).

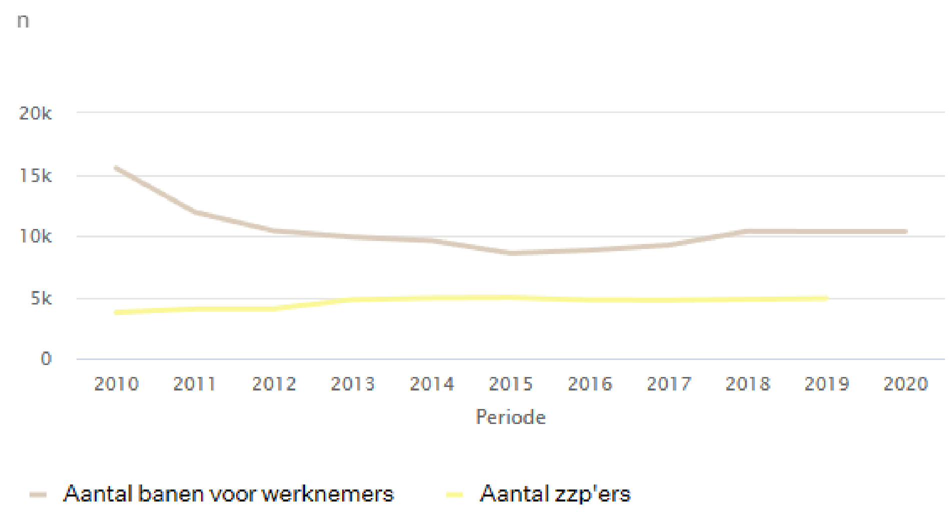


Figure 2. **Number of employees and self-employed at architecture offices, 2010-2020**
[Number of jobs for employees; Number of self-employed]

Source: Statistics Netherlands (CBS) and Architects Registration Bureau (BA)

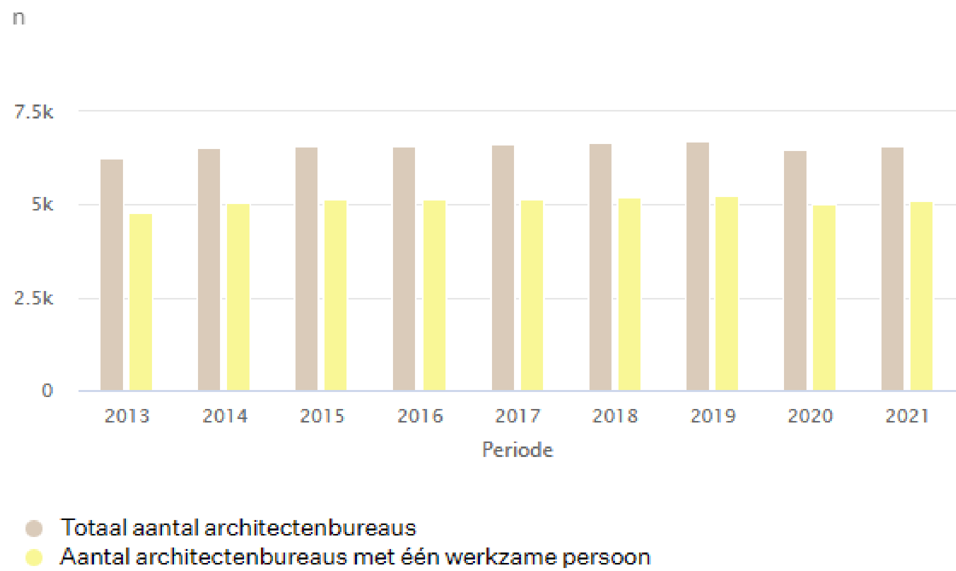


Figure 3. **Number of architecture offices, 2013-2021**
[Total number of architecture offices; Number of one-person architecture offices]

Source: Statistics Netherlands (CBS) and Architects Registration Bureau (BA)

As a result of the prevalence of one-person companies, there are concerns among industry advocates about the fragmentation of the architectural profession. Economically speaking, self-employed architects face greater vulnerability and have limited resources to invest, making it challenging for them to engage in selection processes for assignments, among other things. Additionally, the rise in the number of self-employed individuals has been observed to have a negative impact on the quality and professionalism of the field. This fragmentation also hampers the effectiveness of both self-employed architects and the overall sector, as it impedes the collective organization of the profession. (Koetsenruijter and Kloosterman 2018).

The Architects Registration Bureau (BA) implements the Dutch Architects Title Act (1987) and manages the official registration of architects, divided into four disciplines: architecture, urban planning, interior architecture, and garden and landscape architecture. In 2018, 13,750 people were registered with the Architects Register.[127]

The largest group with the legal title of architect are (building) architects, who made up 77 per cent of the total number of registered people in 2018. Some of these architects also have a second title, the majority as interior architects or urban planners. Among the other disciplines, a double title is less common. On average, garden and landscape architects earn the most (33 euros per hour) and interior architects earn the least at just under 24 euros per hour.

The number of self-employed people is relatively highest among interior architects, followed by (building) architects and garden and landscape architects. However, the figures from the Register of Architects do not show any trends regarding the distribution of self-employed people and employees, as this was only measured in 2018. We can examine the data provided by Statistics Netherlands (CBS), based on the relevant SBI codes, to gain insights. According to this data, the number of self-employed individuals has been increasing since 2010 (see the figure 'Architecture offices: Number of employees and number of self-employed without employees'). It should be noted here that this concerns all workers within the SBI code for architects, so not only the officially registered architects. In addition, it is important to mention that in the period 2017-2019 Statistics Netherlands counted no less than 19,000 'architects of buildings' and 3,000 'landscape architects' (CBS 2021a). Therefore, it's important to note, that not every architect in the Netherlands bears the legal title of architect: according to figures from Statistics Netherlands, there are more architects than are registered with the Architects Register.

Diversity and equity in the job market

When looking at the gender ratio[128] in the architecture sector, women tend to be in the minority. Among architects, the female-to-male ratio in 2018 was a striking 24 per cent versus 76 per cent (Kempen et al. 2021). Only among interior architects are women in the majority.

[127] Of the 13,750 architects registered in 2018, 11,350 registrations could be used for the analysis of the data. The numbers in the figures – such as under 'Number of registrations with the Architects Registration Bureau, by subdiscipline' – therefore deviate from the number of registered architects.

[128] Of the 11,350 registered architects in 2018, the gender of 215 is unknown. The total in the figure 'Number of registrations with the Architects Registration Bureau in 2018, by subdiscipline and gender' is therefore equal to 11,135.

Diversity

The following visualization contains data on (1) the number of men and women per sub-discipline and (2) the number of men and women graduates per study programme, HBO being a vocational degree at a university of applied sciences, and (3) WO being a degree at an academic university.

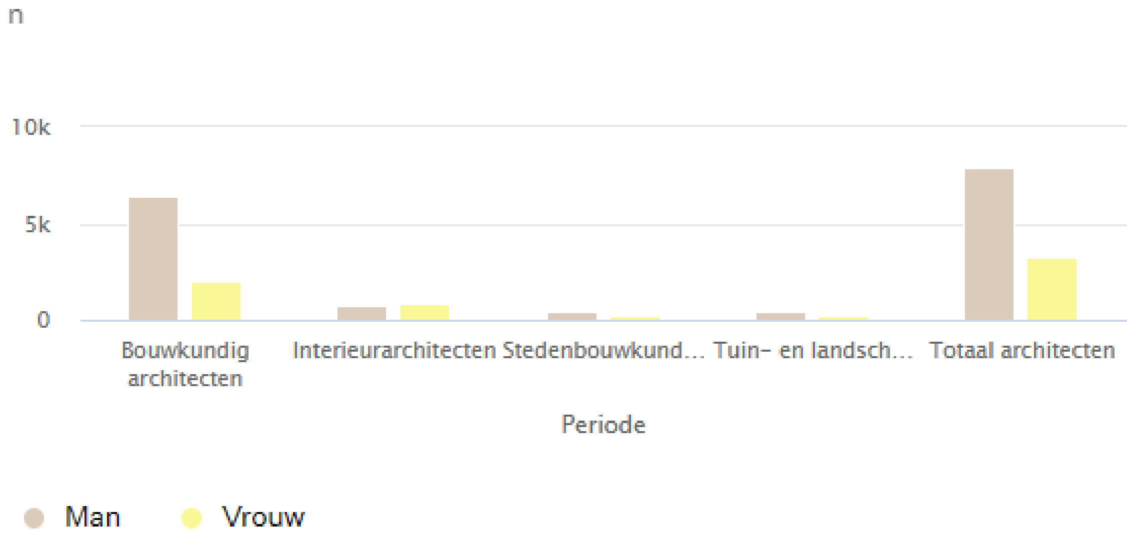


Figure 1. **Number of Architects Registration Bureau registrations by subdiscipline and gender, 2018**
[Period
Architects; Interior architects; Urban planners; Garden and landscape architects
Men; Women]

Source: Statistics Netherlands (CBS)

The differences between women and men on the job market are also reflected in types of employment contract and pay. In the Jaarrapportage 2021: De ruimtelijke ontwerpsector ontleed *[The Annual Report 2021: Dissecting the spatial design sector]*, we see that the higher the gross wage, the lower the number of women earning it. And even though women are overrepresented in the discipline of interior architecture, there is also inequality in terms of part-time work and relatively lower gross (monthly) wages (Kempen et al. 2021). The architecture sector is no exception: there is still a pay gap between women and men in the wider Dutch economy. In 2018, the unadjusted wage difference[129] in the private sector was 19 per cent, and 7 per cent after adjustment. This pay difference is partly due to the fact that 80 per cent of women work part-time, compared to 33 per cent of men. And a part-time job, on average, generates less per hour than a full-time job (CBS 2020).

The Netherlands lags behind other European countries in achieving gender equality in the architecture sector. In 2020, the European average for female architects stood at 42 per cent, an increase of 11 percentage point since 2010. In contrast, only 30 per cent of

[129] Unadjusted means that the pay-gap calculation does not take into account other factors that influence the pay of employees, such as differences in work experience between men and women. The unadjusted wage difference is calculated as the percentage difference in average hourly wages between men and women.

architects in the Netherlands are female. Scandinavian countries fare much better in this regard, with Norway at 44 per cent, Denmark at 51 per cent, Finland at 53 per cent, and Sweden leading with 58 per cent (Mirza & Nacey Research 2021). And although the Dutch figures are based on a small sample, this picture is consistent with the findings in the *Jaarrapportage 2021: De ruimtelijke ontwerpsector ontleed [The Annual Report 2021: Dissecting the spatial design sector]* and the figures from Statistics Netherlands (Kempen et al. 2021; CBS 2021b).

Initiatives such as Mevr. De Architect [Ms Architect], a section of the online architecture magazine A.ZINE, or the theme Vrouwen Ontwerpen ['Designing Women'] in the Architectuurprijs Almere [Architecture Prize Almere] (APA) 2022 help to make the women present in the sector more visible and offer them a podium. In addition, we see that, since the 2017/2018 academic year, the number of women in university education studying architecture and urban planning is almost half of the total number of graduates. In the academic architecture and civil engineering programme, the number of women remains at about a third of total graduates.

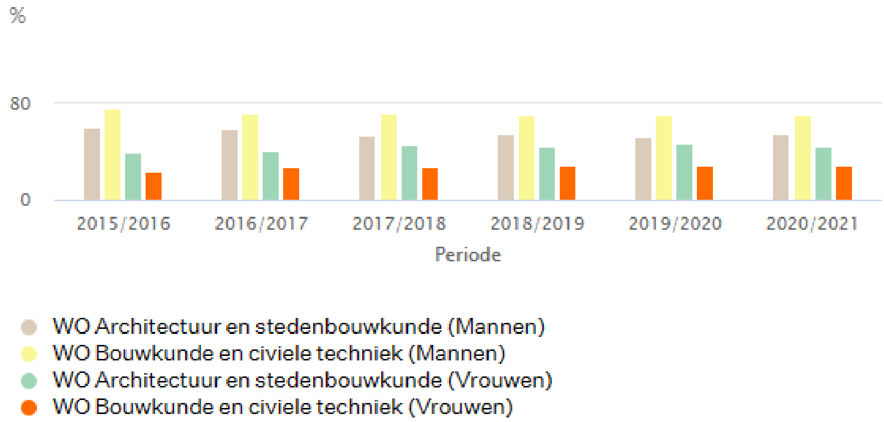


Figure 2. **Architecture graduates by education (HBO) and gender, 2015/2016 – 2020/2021**
[Period;
HBO Architecture and Urban Planning (Men);
HBO Architecture and Civil Engineering (Men);
HBO Architecture and Urban Planning (Women);
HBO Architecture and Civil Engineering (Women)]
Source: Statistics Netherlands (CBS)

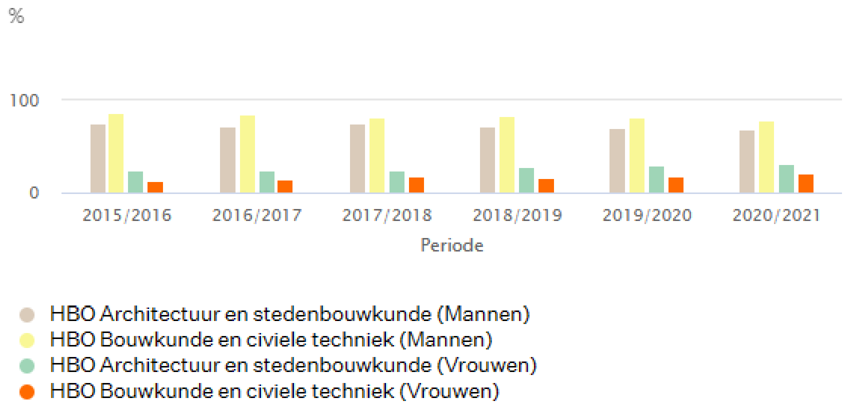


Figure 3. **Architecture graduates by education (WO) and gender, 2015/2016 – 2020/2021**
[Period;
WO Architecture and Urban Planning (Men);
WO Architecture and Civil Engineering (Men);
WO Architecture and Urban Planning (Women);
WO Architecture and Civil Engineering (Women)]
Source: Statistics Netherlands (CBS)

Of course, diversity encompasses more than just gender ratios in the labour market. However, in the field of architecture, there is currently a lack of a structured form of monitoring and data collection to look beyond the female-to-male ratio.

Impact of the pandemic

In autumn 2022, entrepreneurs in the construction chain were less optimistic than six months earlier, according to the Monitor Bouwketen [Construction Chain Monitor] and the BNA Conjunctuurmeting [BNA Economic Survey], both in autumn 2022 (BNA 2022b, BNA 2022c). Architectural firms anticipated a decrease in the number of new construction projects in the near future and reported an average backlog of 4.7 months. This represented a decrease of 1.2 months compared to the spring measurement (BNA 2022b). One in five entrepreneurs also anticipated a decrease in turnover, and one in 50 entrepreneurs expected to reduce their workforce (Ibid.). Due to price increases and supply uncertainty, sustainability is also slowing down, in addition to housing construction. The nitrogen crisis and the resulting stagnation in the process of granting permits by governments, clients and contractors is another factor (BNA 2021a).

This plays out while there are urgent social issues in the areas of housing, work and the living environment. For example, the lockdowns during the pandemic revealed that the need for accessible public space is not evenly met (Boer 2020). The fact that cafés and restaurants, libraries, department stores, theatres, museums and cinemas were closed during the lockdowns affected the entire population, but not everyone equally (Ibid.). Therefore, as the sector recovers, it is important to consider the inclusivity of public spaces and the diversity of the city.

During lockdowns and the shift to remote work, it became evident that a healthy living environment is important and requires space (Boer 2020, BNA 2021b) – space that is already scarce. The housing crisis worsened even further in the COVID-19 pandemic years of 2020 and 2021, with the target of 80,000 homes missed in 2020 when only 69,000 homes were completed (Hulsman 2021). “This requires spatial designers to play a proactive role in the municipal, regional and national debate on spatial planning. But it mainly requires spatial leadership at a local and regional level,” says Royal Institute of Dutch Architects (BNA) director Fred Schoorl (BNA 2021a).

3. WHAT ELSE WOULD WE LIKE TO KNOW ABOUT THE ARCHITECTURE SECTOR?

In the future, we would like to pay more attention to architecture and vocational education with the Culture Monitor. The question arises regarding the actual number of designers who successfully progress in their careers and where they end up, including outside the practice of a design firm. Additionally, there is still insufficient understanding of the impact of the professional experience period (a requirement for official registration as an architect) on the intake in the Architects Register (Kempen et al. 2021). During this two-year period, recent graduates gain professional experience under the guidance of a mentor. The regulation has only been in effect since 2015.

Moreover, the architectural sector is not bound by national borders. It is pre-eminently a domain that must be viewed from an international perspective, and to which priority is also given in cultural policy (Engelshoven 2019). Not only do Dutch architects and firms work abroad, the Netherlands itself also attracts many international students. The impact of this two-track interaction on the Dutch design climate deserves further attention in future updates of the Culture Monitor.

In addressing societal challenges, it is essential for architects or designers to have a sufficient awareness of diversity within society. Therefore, diversity within the architecture sector itself is a crucial prerequisite for addressing the diverse range of needs and preferences concerning one's living environment. However, unlike the highlighted gender representation, there is limited visibility regarding diversity in terms of origin or ethnicity. And although the Barometer Culturele Diversiteit [Cultural Diversity Barometer] – a CBS dashboard with figures on cultural diversity in the job market – is still based on the questionable categories of 'Western' and 'non-Western'[130], this instrument does demonstrate the homogeneity of the architecture sector. The legitimate question is what the lack of diversity within the sector means for "the ability of spatial designers to address social questions with the right insight" (Kempen et al. 2021, 8).

Finally, for this first inventory of the domain, we spoke with experts in the field of architecture and the architectural profession, which is the largest professional group within this broad sector. Furthermore, as much data as possible about other disciplines such as landscape or interior architecture has been used, but specific trends from these sub-disciplines may have been underexposed. For a more representative – and therefore more diverse – picture of the sector, we will pay more attention to this in the next update.

4. WHAT ELSE WOULD WE LIKE TO KNOW ABOUT THE ARCHITECTURE SECTOR?

View more data about the Architecture domain in the Culture Monitor dashboard. More literature on the domain of Architecture can also be found in the knowledge bank of the Boekman Foundation.

5. SOURCES

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[130] Encouraged by recent social discussions about the sustainability of these terms, Statistics Netherlands has announced that it will gradually change this classification from 2022 to a new classification of the population by origin. The new origin classification consists of two parts: born in the Netherlands, and country of origin (CBS 2022).

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6. DISCUSSION PARTNERS

In 2021 we spoke to the following people when gathering information for the development of this domain page:

- Floris Alkemade (then Chief Government Architect)
- George Brugmans (director, International Architecture Biennale Rotterdam)
- Dominique Geelen (architecture coordinator, Creative Industries Fund NL)
- Ludo Groen (researcher, Nieuwe Instituut/The Berlage)
- Cilly Jansen (director, Architectuur Lokaal)
- Anneleen de Jong (senior policy officer, Architects Registration Bureau)
- Jasper Kraaijeveld (policy advisor, Royal Institute of Dutch Architects/BNA)
- Jorrit Rosema (director, Architects Registration Bureau)

THEMES

What are Themes?
The theme pages of the Culture Monitor deal with issues that are important not just for one cultural domain, but for the whole cultural sector. Theme pages put developments into perspective and allow for the discovery of connections between domains.

Unlike the domain pages, the theme pages have a more flexible structure. Depending on the theme, the pages may take the form of a data story, an analysis, or a review of the literature. In the future, new themes will be added to the Culture Monitor and the existing theme pages will be updated.

Detail cover *Culture Monitor Year Report* 2022 / Illustration: Fadi Nadrous

THEMES

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OVERVIEW

Professional Practice

The Professional Practice theme page provides information on the composition of the cultural labour market. We look at the impact of the coronavirus pandemic on the sector as a whole, and also explore the differences between domains.

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Digital Transformation

The Digital Transformation theme page provides a quantitative inventory of the data available so far to understand how digital transformation is changing the cultural sector and the different domains within it.

>>> jump to chapter

Diversity, Equity and Inclusion

On this theme page we explore research on Diversity, Equity and Inclusion in the Dutch cultural sector. What are the current issues, and what makes monitoring them so complex?

>>> jump to chapter

Sustainability

Sustainability and the climate crisis are increasingly important issues. This data story describes how the cultural sector is working on sustainability, the role of the climate crisis in the work of cultural practitioners, and the potential impact of climate change on the sector.

>>> jump to chapter

Culture in the Regions

Where can we find the most theatres, libraries, cinemas or museums? How many cultural visits are made? This theme page describes (developments in) cultural provision, participation, and funding flows at provincial level.

>>> jump to chapter

Culture and Participation

This theme page shows the developments in attendance and practice and invites you to explore more cultural data in the Culture Monitor Dashboard.

>>> jump to chapter

THEME: PROFESSIONAL PRACTICE

The Professional Practice theme page is the place to find information about the composition of the cultural labour market. What do we know about the self-employed and about jobs? We also look at the differences in approach between firms and professions. The impact of the coronavirus pandemic is examined for the group as a whole as well as the differences by sector. We look at income and turnover, as well as information on individual characteristics.

Written by Rogier Brom
Last updated: 27 January 2023

Unmute Us / Photography: Lisa Maatjens

SUMMARY

A large number of self-employed people work in cultural and creative occupations. This number only increased during the pandemic. There are differences in this trend between various parts of the sector. For example, the growth in self-employment in the Arts and Cultural Heritage sub-sector – where most self-employed people work – almost came to a halt, while growth in the Creative Business Services sub-sector actually increased. Jobs for employees experienced a dip in 2020, but recovered in 2021 and 2022. Again, Arts and Cultural Heritage recovered less well than other sectors, and only picked up again in 2022.

The cultural and creative sector, more than most, has had to contend with the consequences of the pandemic, as evidenced by the turnover of self-employed people in culture and unemployment among arts graduates. The struggle varies according to cultural domain. To be able to fully explain this, we need a better picture of the working practices of artists and the ecosystem in which they operate.

1. INTRODUCTION AND IMPORTANCE OF THE THEME

With the coronavirus in the rear-view mirror, there is every reason to analyse its impact on the cultural and creative sector. It is important to look at the position of workers in the sector – both employed and self-employed – not only from the perspective of the labour market, but above all from the perspective of professional practice. There are major differences between the domains. An integrated overview of the trends in the cultural job market arises from a multitude of sources.

What do we currently know about the status of creative professional practice? The cultural labour market is known to be precarious. In the comprehensive survey Passie gewaardeerd [Passion Appreciated] from 2017, the challenging position of many workers in the sector is highlighted. Since then, the arts advocacy platform Kunsten '92 has launched the Arbeidsmarktagenda [Labour Market Agenda], the Fair Practice Code has been drawn up, and one of the four main topics named in State Secretary Uslu's Meerjarenbrief [Multi-year policy paper] is the improvement of the position of the cultural and creative worker. In this thematic analysis, we provide an overview of a number of important developments.

2. COMPOSITION OF THE CULTURAL LABOUR MARKET AND IMPACT OF THE PANDEMIC

In the previous edition of this text (in Dutch), it became clear that it is actually inadequate to speak of the cultural and creative labour market as a whole. The relationship between the number of employed jobs and the number of self-employed jobs varies between the different parts of the sector, as does the evolution of these relationships. At the same time, it became clear during the pandemic that the different practices of workers in the sector also had a major impact on how they were affected by the anti-coronavirus measures.

Self-employed

In recent decades, the number of self-employed people in the wider Dutch labour market has continued to grow, increasing by 37 per cent in 2021 compared to 2010. For the Cultural and Creative Sector (CCS), there was an increase of 61 per cent during the same period. However, this increase is largely determined by the Arts and Cultural Heritage sub-sector,[131] where the increase is 75 per cent and where, moreover, the majority of self-employed people are to be found (CBS 2023).

The above figures are based on the economic classification of the sector. The sector is made up of companies and the associated SBI (Standard Business Identification) codes. However, it is also possible to look at the sector from the perspective of professional groups. Statistics Netherlands (CBS) did this in the monitor Kunstenaars en werkenden in overige creatieve beroepen [Artists and workers in other creative professions]. The growth in the number of self-employed people without employees is mainly to be found among the artists.[132] Between the period of 2010-2012 and that of 2017-2019, the number of self-employed people increased by 24 per cent, but only 5 per cent among the other creative professions. The share of self-employed people among all artists was between 57 and 58 per cent throughout the entire period. In the other creative professions, this percentage fell from over 35 per cent in 2010-2012 to over 32 per cent in 2017-2019, while in the total employed workforce it rose from just under 11 per cent to over 12 per cent. The same source also provides information on how much time per week the different groups spend on working in their so-called main job, i.e. the occupation on which they spend the most time. It's apparent that the distribution between part-time and full-time work among artists closely mirrors the pattern observed in the overall workforce.

Self-employment and jobs for employees

The following figures show the development of the number of self-employed people and the number of jobs for employees in the Netherlands as a whole and for the different parts of the cultural and creative sector. Within the Cultural and Creative Sector (CCS), we use the sub-sectors Arts and Cultural Heritage (ACH) Media and Entertainment (M&E) and Creative Business Services (CBS). The numbers on self-employed people and jobs are indexed (2010=100). The percentages of self-employed people were taken from the EBB, a survey of the workforce by Statistics Netherlands.

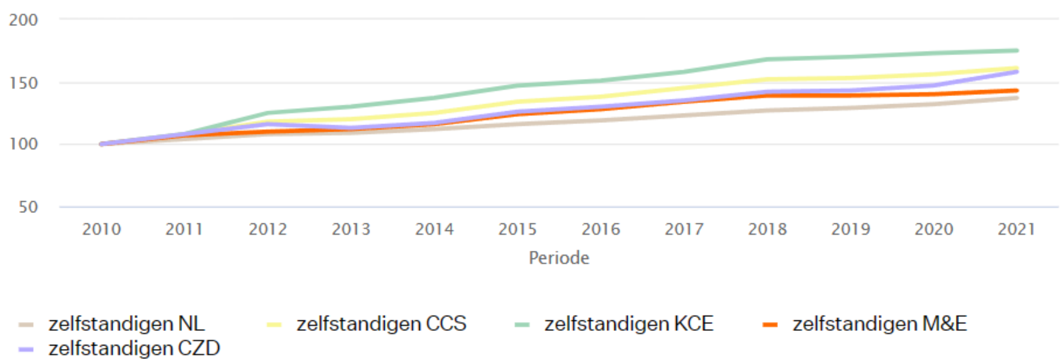


Figure 1. **Self-employed: Dutch total and CCS (indexed 2010=100)**

[Period; Self-employed all NL; Self-employed ACH; Self-employed M&E; Self-employed CBS]

Source: Statistics Netherlands (CBS)

[131] This sub-sector is described as Arts in some versions of the custom table,but includes the same SBI codes as in other editions.
[132] The term 'artist' includes visual professions, design professions, performing professions, writers, translators and other artistic professions.

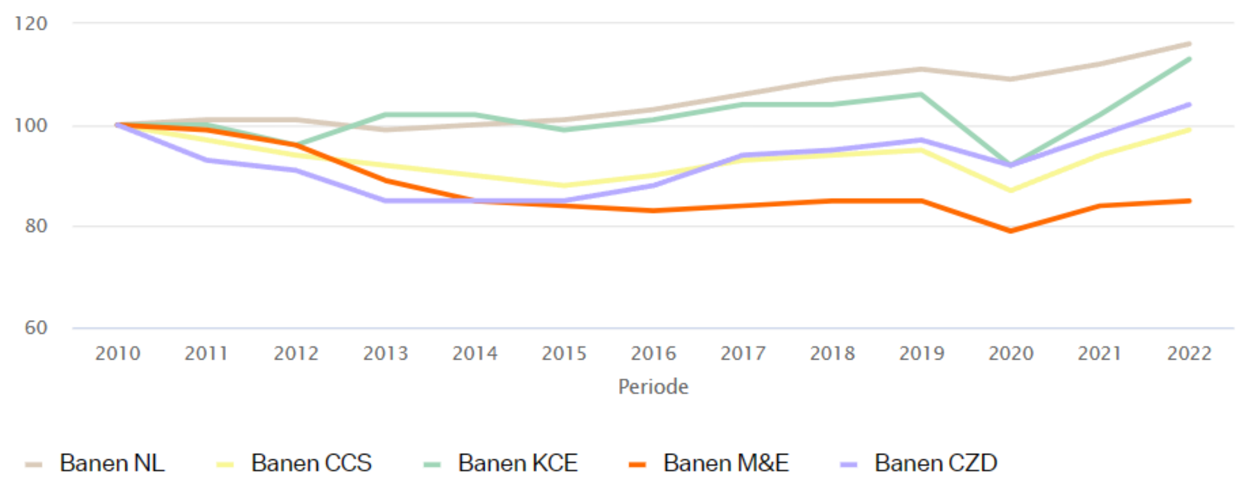


Figure 2. **The number of jobs for employees, according to Statistics Netherlands**
[Period;
NL jobs; CCS jobs; ACH jobs; M&E jobs; CBS jobs]
Source: Statistics Netherlands (CBS)

Jobs
The breakdown of companies also shows how many jobs there are in the sector. And although self-employed numbers did not fall in 2020, the picture is different for jobs for employees. A clear decline can be seen in 2020, which is strongest in the Arts and Cultural Heritage sub-sector, where the increase in 2021 compared to 2020 is also the largest of all parts of the sector. It is important to note, however, that the amount of jobs in this sub-sector is consistently the lowest. On average, there are 0.83 full-time equivalent jobs in both media and entertainment and creative business services, compared with around 0.69 full-time equivalent jobs in arts and cultural activities (CBS 2023).

The number of workers who decided to leave the cultural sector in 2020 because of the anti-coronavirus measures is not clearly visible in the figures. We know that the majority of subsidized organizations did not cut back on permanent contracts, and that the costs for temporary contracts were reduced by 29 per cent in 2020 (Goudriaan et al. 2021). In 2021, however, the number of jobs for employees increased again. The number of self-employed people continued to grow annually during the pandemic period. However, there was a difference between the various sub-sectors. Arts and Cultural Heritage remained the sub-sector where most self-employed people work, but the increase here was not as strong after 2019. However, Creative Business Services saw a large increase during this period. Furthermore, research shows that during Covid, small cultural organizations put more effort into keeping self-employed people on board than larger organizations did (Goudriaan et al. 2023).

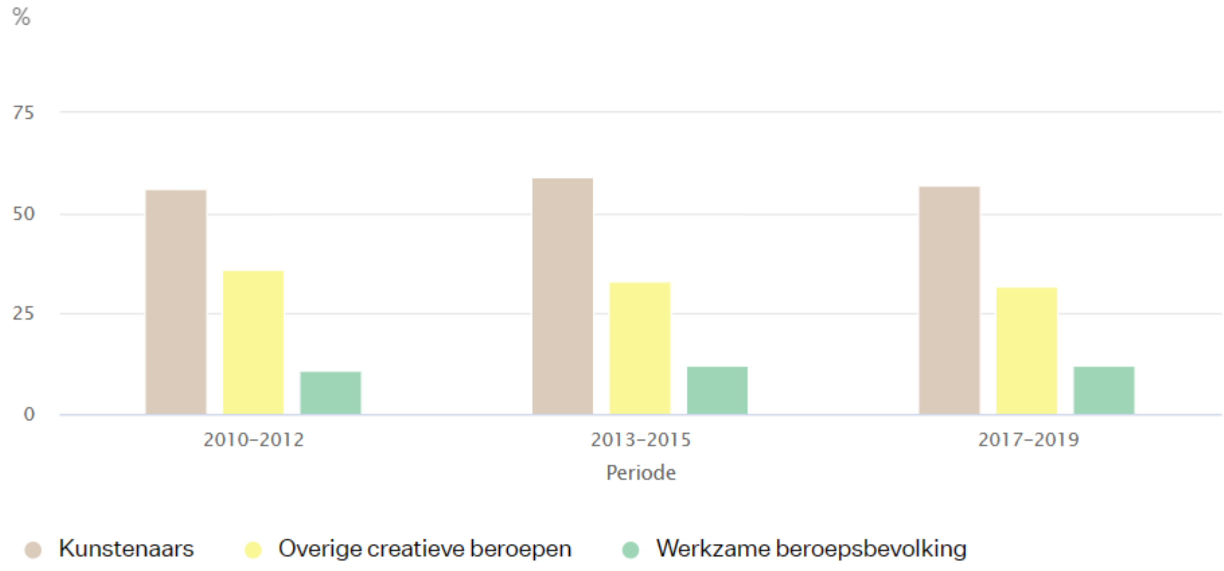


Figure 3. **Percentages of self-employed people**
[Period;
Artists; Other creative professions; Employed working population]
Source: Statistics Netherlands (CBS)

3. NEWCOMERS

One of the consequences of the closures – and the limited opening hours – of cultural destinations during the pandemic was the increased pressure on the capacity for performance capacity. For example, due to anti-coronavirus measures, the member venues of the stage association VSCD could use only 28 per cent of their capacity in 2021 (VSCD 2022). In practice, this meant that there were greater opportunities for performances by known artists or groups than for newcomers. 'Safe' programming seemed to reinforce this effect (Been et al. 2022). Newcomers therefore appear to have had a harder time.

A study by ROA of the University of Maastricht shows that graduates of the arts sector are more severely affected than other young graduates (Allen et al. 2022). For this study, three measurements were taken during the pandemic: in May 2020; between mid-December 2020 and February 2021; and between 16 September and 17 November 2021. This research focuses on relatively recent HBO (higher vocational education) graduates in the arts. In addition to the fact that this group as a whole has been hit relatively harder than alumni of other higher vocational education programmes, it appears that among arts graduates, those working in performing professions have experienced higher rates of unemployment. Specifically in theatre, the unemployment figures go from one of the lowest values for all arts graduates before the pandemic (between 0 and 5 per cent), to by far highest value at the first measurement (between 35 and 40 per cent). In addition to increasing unemployment, theatre professionals also saw the largest decrease in their average gross monthly wage in 2020, a trend that continued in 2021. For almost all other graduate groups, an increase in gross monthly salary was seen in 2021, except for heritage professionals, where there was a small decrease. It is striking that the musicians are the only group among the arts graduates who managed to convert the decrease in monthly wages in 2020 into an increase in 2021. The gross monthly wages of the total group of graduates of higher professional education arts programmes fell slightly in 2020. In addition, the number of graduates taking art courses in 2020 also fell more sharply than that of all students taking higher professional education courses. It is noteworthy here that there was a large decrease in the total number of graduates in 2021, while the decrease for art courses in the same year was small.

In addition to developments among art graduates, however, it is useful to take a broader perspective on what we know about the earnings of self-employed individuals in the sector.

Graduates of HBO art programs

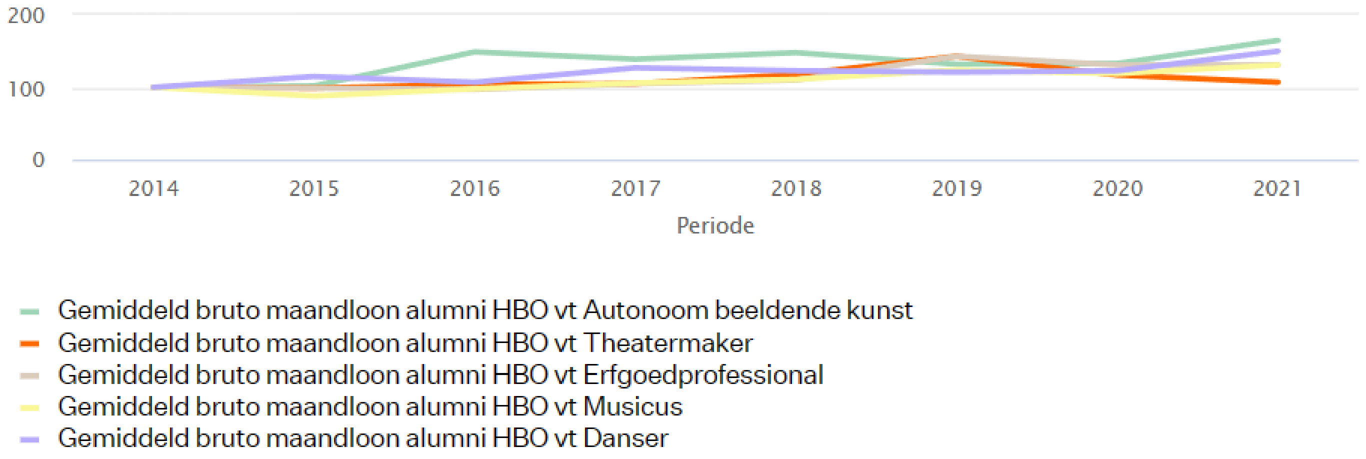


Figure 1. **Gross monthly earnings of alumni of HBO art courses 18 months after graduation**
Indexed (2014=100)
[Period;
Average gross monthly earnings of HBO-graduate autonomous fine artists;
Average gross monthly earnings of HBO-graduate theatre-makers;
Average gross monthly earnings of HBO-graduates in heritage professions;
Average gross monthly earnings of HBO-graduate musicians;
Average gross monthly earnings of HBO-graduate dancers

Source: ROA

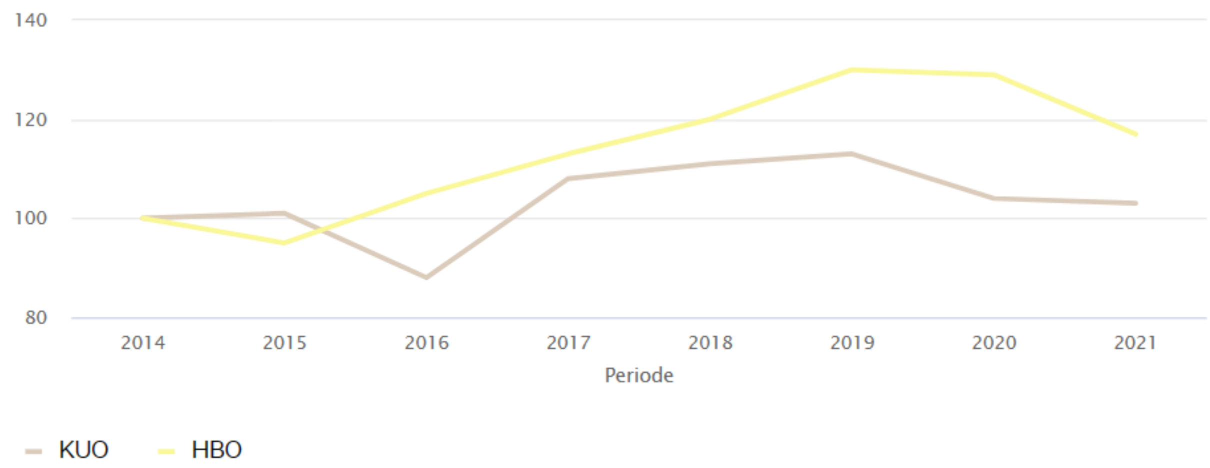


Figure 2. **Number of graduates of full-time HBO (vocational education) courses**
Indexed (2014=100)
[Period;
KUO (HBO graduates of art courses); HBO (all HBO graduates)]

Source: ROA

4. INCOME AND TURNOVER

Norwegian research shows that the Norwegian artists' income from artistic work fell by 11 per cent between 2019 and 2020 (Askvik et al. 2022). However, this was partly offset by other income, for example from other activities or government support. As a result, their total income fell by only one per cent.

It is also known from previous studies that only half of the income of Dutch artists comes from their artistic work (Loots et al. 2022). Further information on the incomes of Dutch artists and other workers in creative occupations, as well as figures on employment, are available from both occupational and enterprise data. The income data for Dutch artists is not very up-to-date and covers the period 2017 to 2019, for which an average is known. The data shows that the median personal gross annual income of artists is below that of all working people in the Netherlands and far below that of other groups who – according to Statistics Netherlands' definition – have highly complex, specialized professions that require a higher vocational or academic education. To the extent that the various artistic professions can be broken down in this data, it can be seen that the visual professions have the lowest incomes and the design professions the highest (CBS 2021). Statistics Netherlands published more up-to-date data on income in the form of turnover figures for the self-employed per quarter for the years 2019 to 2021.[133] In 2019, the turnover of all Dutch self-employed people is subject to a dynamic

[133] In order to draw conclusions from this about developments in turnover between and during these years, it must first be established that 2019 was a representative year. However, this is impossible to determine for the sector as a whole and the conclusions on turnover should therefore be treated with caution. However, they provide the only available insights and it is likely that 2019 is not unrepresentative overall.

where turnover is low in the first quarter, higher in the second quarter, falls again in the third quarter, and reaches the highest value of the year in the fourth quarter. This is a picture that is recognizable in the cultural and creative sector. In 2020, however, the picture is shattered. In the Netherlands as a whole, the increase in the turnover of self-employed people in the second quarter does not materialize. But while the level of average turnover in the Netherlands as a whole remains stable, it fell sharply within the CCS in the second quarter. The numbers then go up, but the recovery is not evenly distributed. While the Creative Business Services sub-sector in the fourth quarter of 2020 is at a comparable level to the same quarter of 2019, the Arts and Cultural Heritage sub-sector remains stuck in Q4 2020 at the level of the first quarter of 2019, which was the quarter with the lowest revenue.

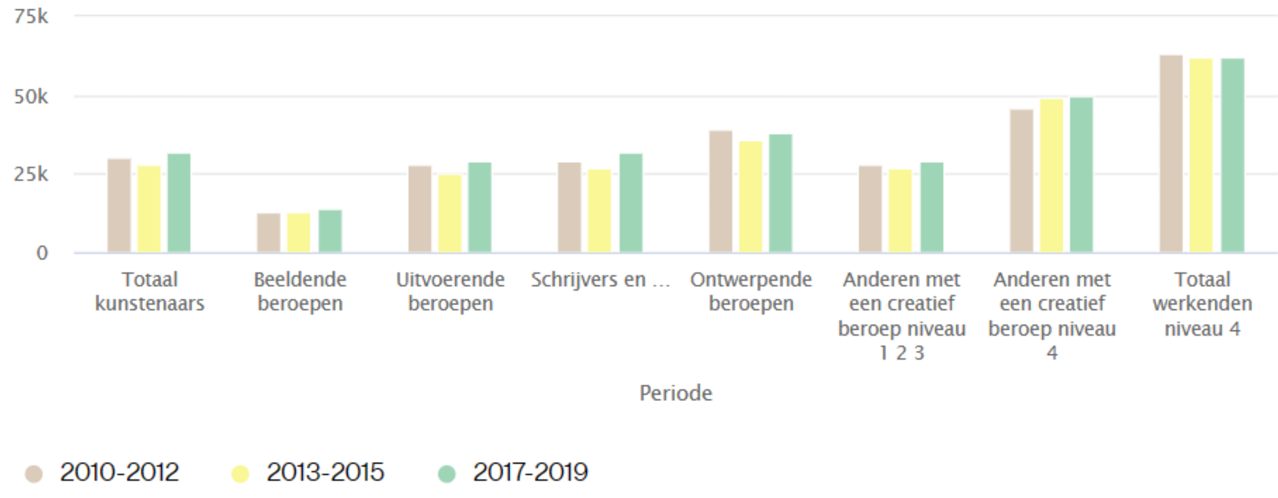


Figure 1. Median personal gross annual income
€ (in 2019 prices)
[Period; Range: 0 to 75000.
All artists; Visual professions; Performing professions; Writers and other creative artists; Designing professions; Others with a creative occupation, level 1 2 3; Others with a creative occupation, level 4; Total working people level 4]

5. TURNOVER BY SECTOR

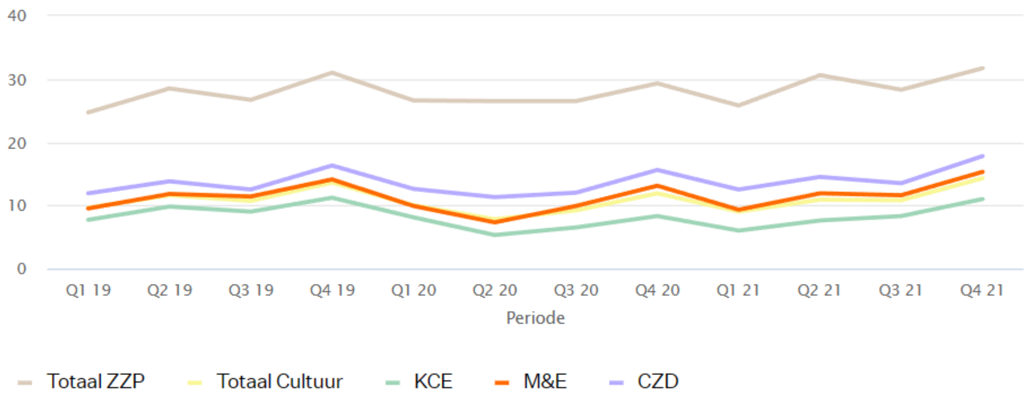


Figure 2. Average turnover per quarter
x 1,000 €
[Period;
Total self-employed; Total culture; ACH; M&E; CBS]

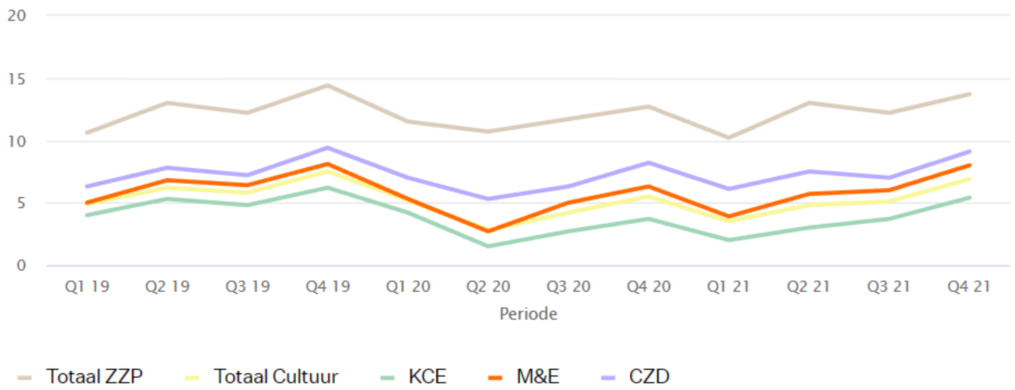


Figure 3. Median turnover per quarter
x 1,000 €
[Period;
Total self-employed; Total culture; ACH; M&E; CBS]

In their publication on artists' incomes and earning capacity, Loots and Witteloostuijn indicate that artists' sources of income vary from sector to sector (Loots et al. 2022). This also explains why turnover can be influenced in different ways by measures such as those taken around the outbreak of the coronavirus. The turnover figures are relatively easy to group into different domains. It can be seen that for the creative arts and design professions the average and median turnover of the self-employed was only slightly affected in the second quarter. In the performing arts, however, the decline is considerably greater and the level in the fourth quarter of 2021 is still lower than in the same quarter in 2019.

For example, the turnover of freelancers within the creative arts (visual artists, writers, choreographers, poets, composers, etc.) and within architecture and design has hardly been negatively affected. However, this is not the case for self-employed people in the performing arts, where turnover remained low throughout the entire period that the anti-coronavirus measures were in place. As a result, this was the group of self-employed people that received the largest sum of money from the subsidy for a temporary bridging of loss of income for the self-employed (TOZO).

The following figures show the turnover of self-employed people in various domains.

The music and book industries have few problems in their turnover after the second quarter of 2020, except for a dip in the first quarter of 2021. It should be noted, however, that performing musicians and authors are not included in these figures. The musicians are part of the performing arts figures, and the authors are part of the creative arts. There are also consequences to the way the situation is responded to. Although book sales increased, it was mainly digital sales that benefited. Bookstores that rely mainly on physical sales were hit hard, and the extra costs they incurred due to the pandemic are not reflected in the sales figures (see the Literature domain).

This picture is partly consistent with the story that emerges from a study of the Dutch creative labour market, in which jobs are divided into different circles. This is based on a theory by David Throsby, who divides the sector into four circles, from a core of performers and producers in the inner circle

Figure 1. **Creating arts turnover per quarter**
x 1,000 €
[Period; Average turnover; Median turnover]

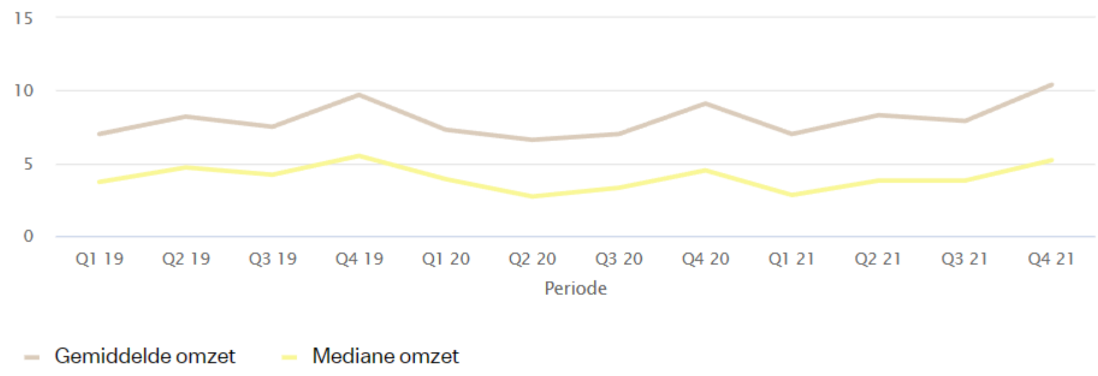
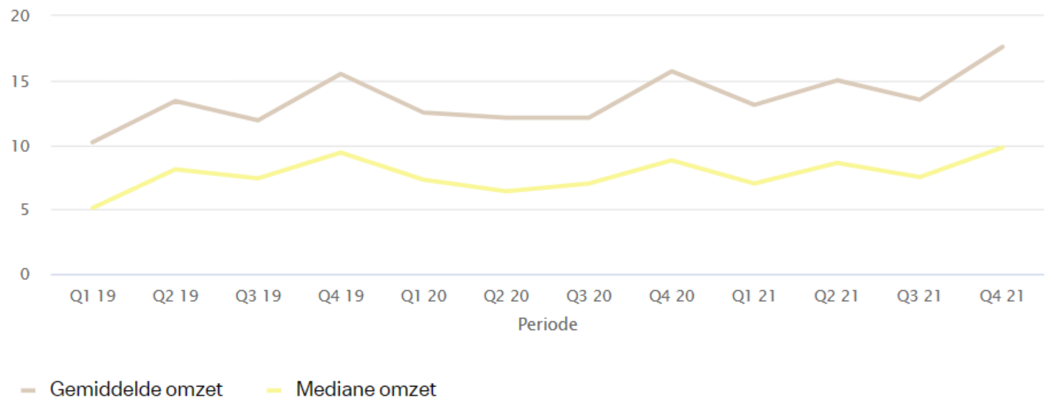


Figure 2. **Architecture and design turnover per quarter**
x 1,000 €
[Period; Average turnover; Median turnover]



to the broader creative industries in the outer circle. The research shows that, in 2020, incomes fell only in the first circle. Moreover, average incomes fell only among the self-employed and those with temporary contracts (Been et al. 2022). The picture that we present from the turnover figures adds the nuance that it is mainly the performers and producers in the first circle who have seen their turnover from sales fall. The same study also shows that there is still little migration out of the sector, and little movement between the different circles within it.

In addition to the decline in turnover in 2020, the economic added value of the CCS also fell at a much faster rate. Once again, it is the Arts and Cultural Heritage sub-sector that is hardest hit: the added value here decreased by 60.8 per cent in 2020, compared to an average decline of 3.8 per cent for the Netherlands as a whole (Rutten et al. 2022). The *Creative Industry Monitor* attributes this to the strong internal dependence within the sector, where the fall in turnover is related to a fall in demand from colleagues (Ibid.).

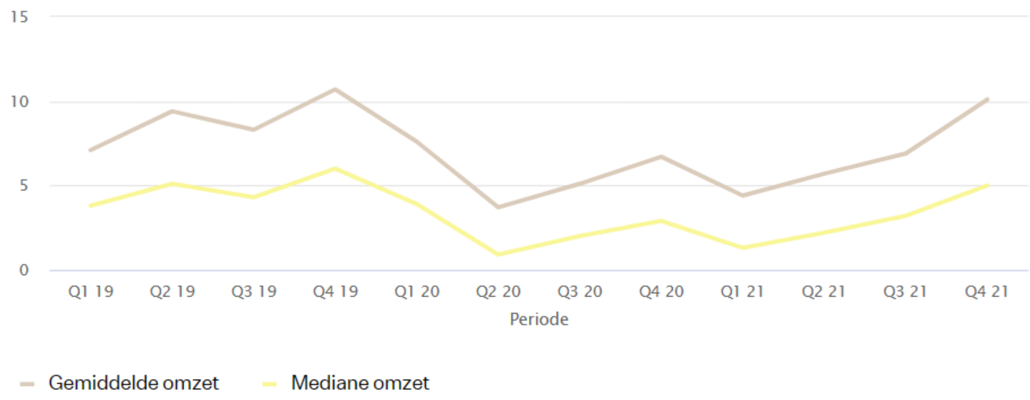


Figure 3. **Performing arts turnover per quarter**
x 1,000 €
[Period; Average turnover; Median turnover]

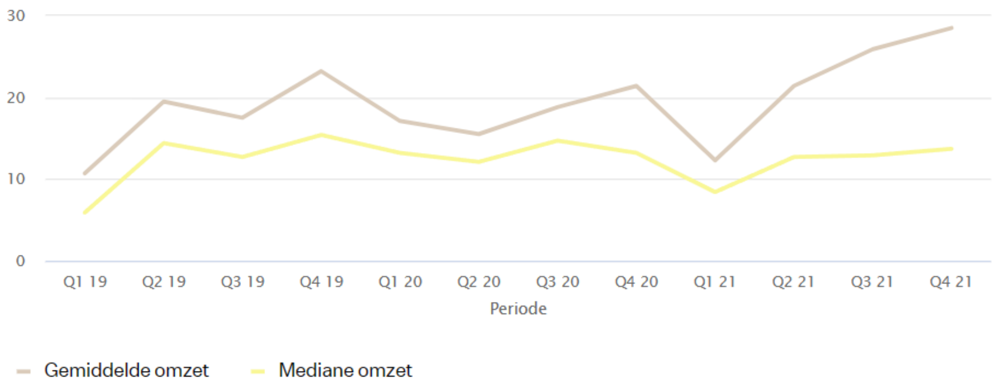


Figure 4. **Music industry turnover per quarter**
x 1,000 €
[Period; Average turnover; Median turnover]

6. DIFFERENT PRACTICES

During the pandemic, it became clear within the groups of workers to what extent the different practices that exist in the different domains are influenced by the infrastructure within which this practice takes shape. Chain dependency played a role during the pandemic, especially when a platform – in the broader sense of the word – was necessary for conducting activities. At first glance, therefore, the decline in the turnover of performing artists is logical given the closure of stages and the associated decline in the number of performances that could be seen during these years. At the same time, it is good to recognise that the dependence on the infrastructure extends beyond the closure of stages and that developing an alternative professional practice has not been an easy task. The question here is what opportunities have the workers in the sector to navigate the labour market and thereby generate turnover.

Across the sector, it is becoming increasingly clear from a variety of sources that the cultural and creative sector has an atypical market mechanism. The supply is extremely diverse, the value of the supply is often difficult to predict, and, for many, the process of producing a product holds at least as much

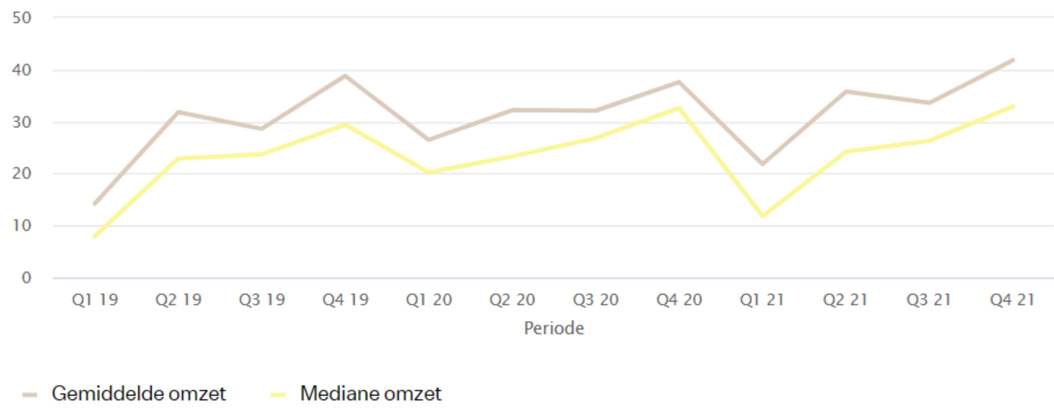


Figure 5. **Book industry turnover per quarter**
x 1,000 €
[Period; Average turnover; Median turnover]

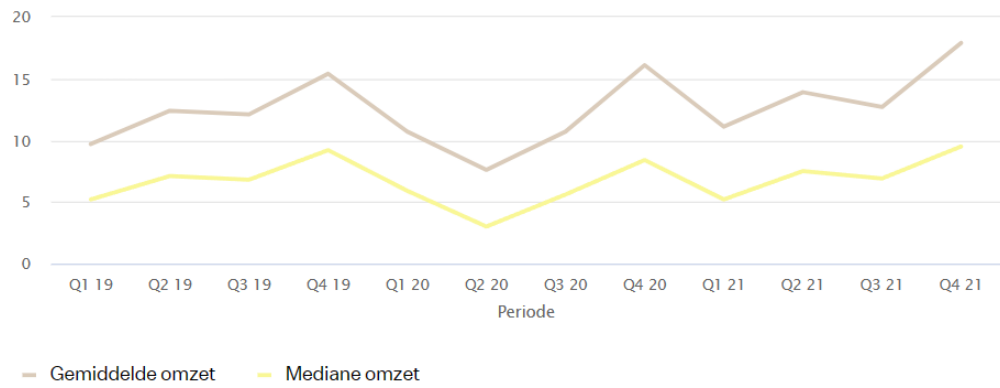


Figure 6. **Film industry turnover per quarter**
x 1,000 €
[Period; Average turnover; Median turnover]

value as the product itself (which sometimes leads to the risk of overproduction). In addition, in much of the sector, a small group of workers accounts for the majority of the income (Loots et al. 2022). It is also becoming clear that, despite the low incomes and a 'surplus' of workers, few creatives change jobs (see, for example, Loots et al. 2022, Jong et al. 2021). The above illustrates why it is important to look at the position of workers in the sector not only from a labour-market perspective, but also to focus primarily on professional practice. How this practice can (or should) influence working conditions is currently being explored by the ACCT platform as part of the fairPACCT programme. But there are other ways in which this perspective can add value.

Working hours for men and women

The figures on this and the following pages indicate how many hours per week men and women work in the Netherlands as a whole, for all creative professions combined, and in the performing arts.

Figure 1. **Weekly working hours of men and women for the total working population**
n x 1,000
[Hours per week;
Less than 12 hours; 12 to 20 hours; 20 to 35 hours; Full time;
Men; Women]
Source: Statistics Netherlands (CBS)

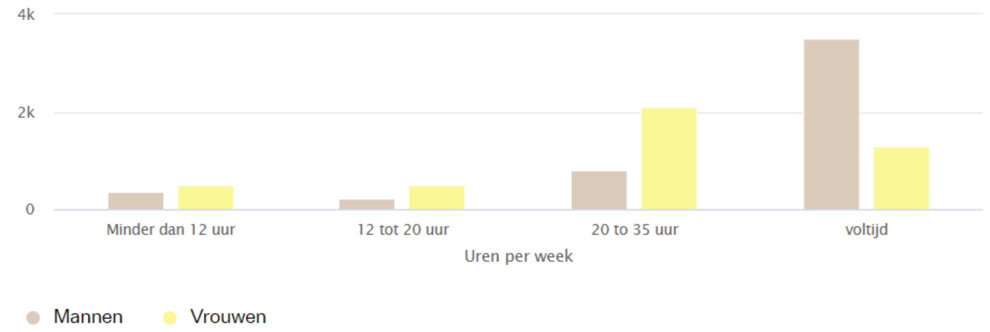
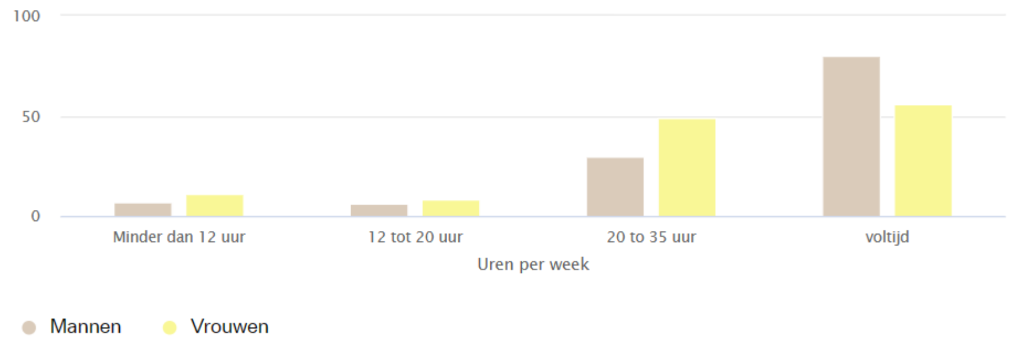


Figure 2. **Weekly working hours of men and women in creative and linguistic occupations**
n x 1,000
[Hours per week;
Less than 12 hours; 12 to 20 hours; 20 to 35 hours; Full time;
Men; Women]
Source: Statistics Netherlands (CBS)



The different practices within the cultural and creative sector also provide a better insight into the broader characteristics of the different domains. For example, the cultural and creative sector, just like the rest of the Netherlands, has a different gender distribution when it comes to working hours. Women are over-represented in part-time jobs, and men in full-time jobs. Although this difference is smaller than for the Dutch labour market as a whole, there are differences between the occupational groups.[134] For graphic designers and performing artists, for example, the picture is roughly the same as for the sector as a whole, with just over 60 per cent of men in full-time jobs. In the visual arts, however, the majority of full-time jobs are held by women, at around 55 per cent, while in architecture more than 75 per cent of full-time jobs are held by men. It is unlikely that market forces alone are responsible for these differences. It should be noted here that, although the proportion of women among graduates of higher vocational arts courses is higher than among the total number of graduates in higher professional education, a relatively high number of men work as artists (CBS 2021).

Figure 3. **Weekly working hours of men and women who are performing artists**
n x 1,000
[Hours per week;
Less than 12 hours; 12 to 20 hours; 20 to 35 hours; Full time;
Men; Women]
Source: Statistics Netherlands (CBS)

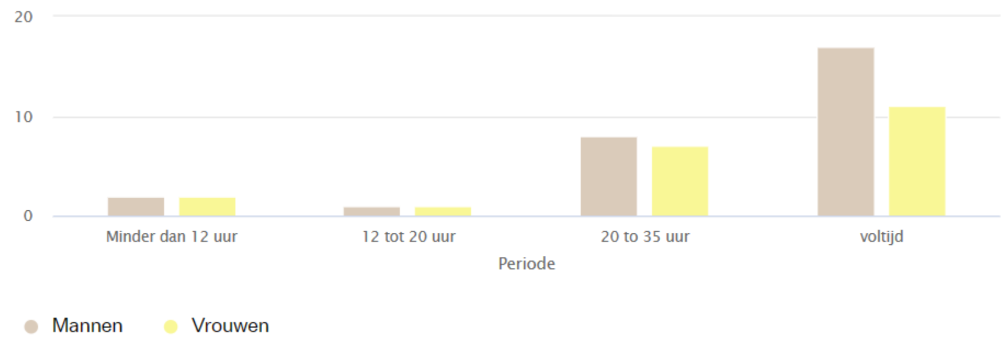
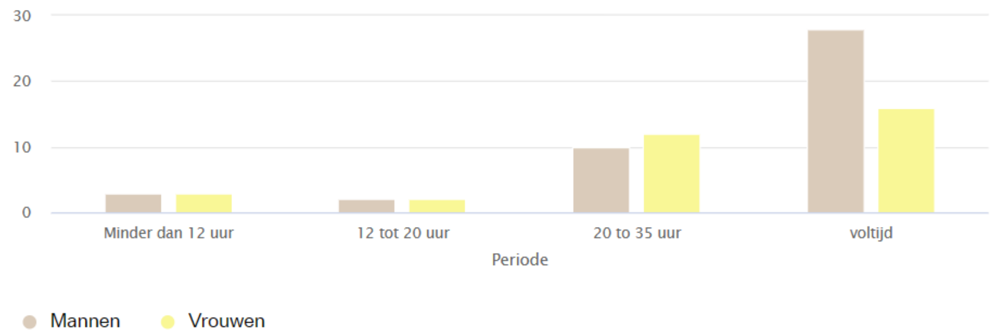


Figure 4. **Weekly working hours of men and women graphic designers**
n x 1,000
[Hours per week;
Less than 12 hours; 12 to 20 hours; 20 to 35 hours; Full time;
Men; Women]
Source: Statistics Netherlands (CBS)



134 It should be noted, however, that the number of people on which this classification is based is small in some of these occupational groups. Conclusions should therefore be treated with caution

A similar difference between the numbers of graduates and working artists can be seen for people who are perceived to have a migrant background. Although the share of people with a migrant background among the graduates of higher vocational education in the arts is growing faster than among the total group of graduates of higher vocational education, this picture is very limited when looking at workers in the sector. This information is available from the classification of occupations. It shows that over the years, there has been [an increase in workers with a migrant background](#) among artists, but the proportion is nowhere near that of graduates.[135] However, no figures are available by domain.

Figure 5. **Weekly working hours of men and women visual artists**
n x 1,000
[Hours per week;
Less than 12 hours; 12 to 20 hours; 20 to 35 hours; Full time;
Men; Women]
Source: Statistics Netherlands (CBS)

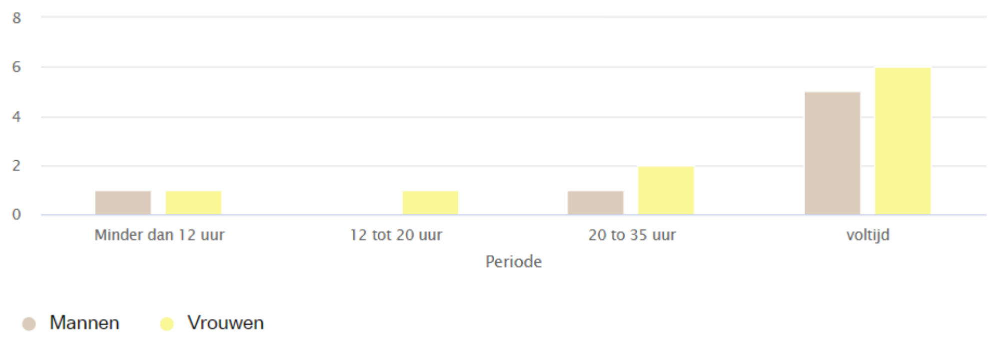
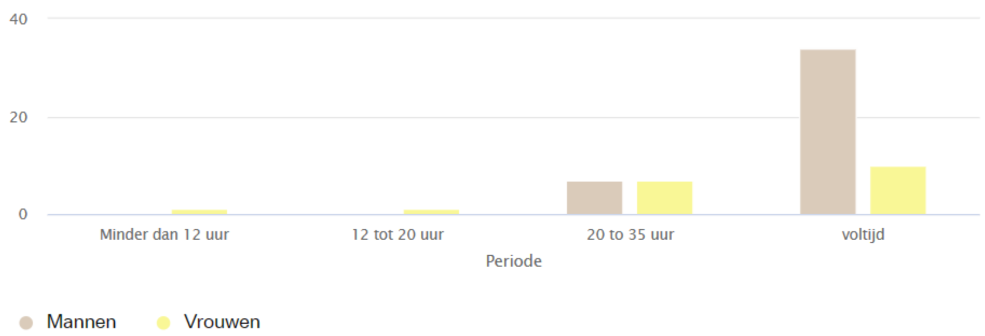


Figure 6. **Weekly working hours of men and women architects**
n x 1,000
[Hours per week;
Less than 12 hours; 12 to 20 hours; 20 to 35 hours; Full time;
Men; Women]
Source: Statistics Netherlands (CBS)



135 It should be noted, however, that the largest increase in people with a migration background is seen from 2018 but that the figures on workers with a migration background run up to and including 2019.

Alumni and HBO graduates
These figures show the percentages of graduates with a migration background and female graduates for all full-time higher vocational education programmes, and for the higher vocational education (HBO) art programmes (KUO).

7. FURTHER DEVELOPMENT

A better understanding of the different practices that characterize the different domains makes it possible to paint a clearer picture of the different impacts when the sector as a whole faces challenges. Achieving greater solidarity among those working in the sector, one of the key starting points of the Fair Practice Code, will be more achievable if it is clearer which workers will be affected by developments and policy decisions, as well as how and to what extent.

This can be done, on the one hand, by increasing research efforts to get a better picture of the composition of workers in different domains, as well as their incomes and underlying motivations, as in the research project Loont Passie? [Does Passion Pay?] in Flanders. We also also need a better picture of career development and the impact of the infrastructure in which work is financed and organized. In which areas are market forces a realistic option, and where is this not feasible or desirable? Where are flexible or more permanent employment relationships preferred, and why? But also, how much room is there in the different domains for real innovation in professional practice? Platform ACCT is already working on answering some of these questions. In cooperation with Kunsten '92, they introduced the Fair Practice Lab to work with organizations (currently only Kunsten '92 members) to crystallize a vision of fair practice tailored to the individual organizations. In due course, we will incorporate their results and other insights and data on this page.

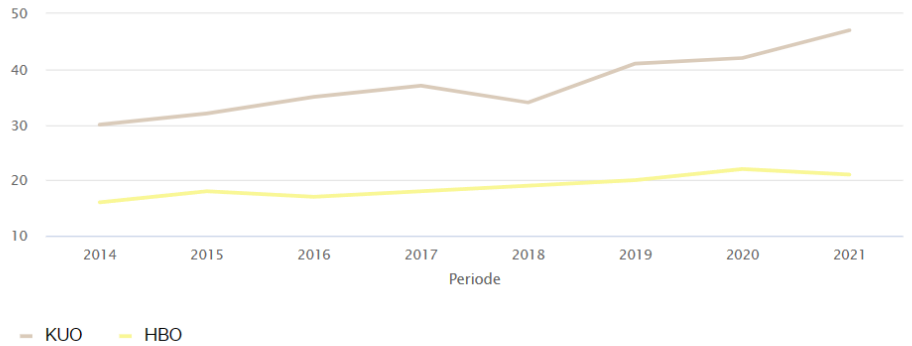


Figure 1. **Percentage of alumni with a migration background**
[Period; HBO; KUO]

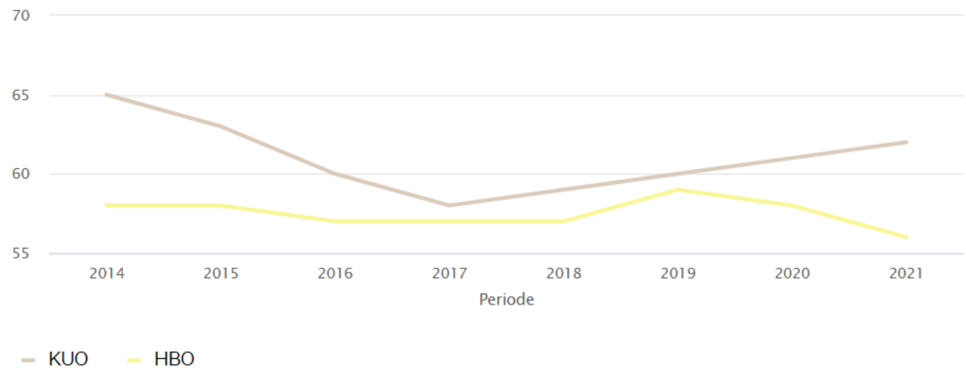


Figure 2. **Percentage of women among HBO graduates**
[Period; HBO; KUO]

8. WOULD YOU LIKE TO KNOW MORE ABOUT THE SUBJECT OF PROFESSIONAL PRACTICE?

See more data on the theme Professional Practice on the Dashboard of the Culture Monitor.

Want to read more about professional practice? Click on the following link for a list of available literature in the knowledge bank of the Boekman Foundation.

A previous edition of the text on this theme page can be found here (Dutch only).

9. SOURCES

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THEME: DIGITAL TRANSFORMATION

Digital transformation offers great opportunities for the cultural and creative sector in the areas of production, distribution, end-use and archiving. This page provides a quantitative inventory of the available data in order to understand how digital transformation is changing the sector and the different areas within it.

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Last updated 30 January 2023

Oerol 2022 / Photography: Lisa Maatjens

SUMMARY

Digital transformation in the cultural sector isn't a recent concept, but it's gained tremendous momentum, largely propelled by the impact of the coronavirus pandemic. This transformation offers great opportunities in the form of new, additional and enriching possibilities in the areas of creativity, distribution, audience outreach, end-user experience, and the archiving of cultural heritage. At the same time, there are barriers that can make the digital transformation unsustainable, such as a lack of financial investment and a shortage of expertise.

First of all, an inventory of the available data on digital transformation shows how different this process is for different areas within the cultural sector. In addition, data currently seems to be mainly on the adoption and use of digital technologies, and to a lesser extent on how this actually and fundamentally 'transforms' organizations. Gaining more insight into this is one of the ambitions for the further development of this thematic analysis.

1. INTRODUCTION AND IMPORTANCE OF THE THEME

An exhibition that could be visited from home with the help of a remote-controlled robot; an Advent calendar with a digital mini-show behind every door; and a festival on an imaginary island or in a virtual hotel... These were just some of the many creative ways[136] in which the cultural sector shared digital work with a wide audience during the 2020 and 2021 lockdowns. While digital transformation is certainly not new for the Dutch cultural sector – one of the world's first live streams[137] was reportedly a concert in Groningen in 1994 – it was accelerated by the pandemic. Since then, the issue has been high on the agenda.

In the discussion on this topic, the terms 'digitization' and 'digital transformation' are used, often with different definitions. Following the example of DEN – Knowledge Institute for Culture & Digital Transformation – we discuss digital transformation in the cultural sector as defined as:

"A continuous change of the entire organization, driven and supported by the increasing use of digital technologies. At the heart of the transformation is a change of business model. The main question is how the organization can continue to deliver value to its customers. Transformation touches every aspect of an organization, including its culture, strategy, processes, relationships and the skills of its people." (Jansen et al. 2022 in DEN 2022).

The opportunities of this digital transformation for the cultural sector are enormous. Digitization offers countless new ways to create and produce art and culture, or to broaden, deepen or enrich[138] the experience of existing art forms. It makes culture accessible to entirely new target groups, such as people who cannot or do not want to come to a cultural venue themselves, visitors in foreign countries, or young people for whom the virtual world is a second home. Digitization opens up new opportunities for (international) cooperation, offers opportunities to earn money beyond the physical product and makes it possible to

[136] During these lockdowns, the Boekman Foundation collected and shared online initiatives from cultural makers and organizations. The overviews of 2020 and 2021 can be read online.

[137] However, the possibilities of this live stream were still limited: the four people who watched saw one or two images with a resolution of 150 x 200 pixels per second, without sound. In 2019, the short documentary Ready Set Rock 'n Roll was made about this live stream.

[138] Digital transformation thus offers opportunities *in addition to*, and not *instead of,* physical events, performances and possibilities.

preserve the culture being produced today for future generations (DEN 2022, Raad voor Cultuur 2022).

However, the challenges are substantial. In September 2022, for example, the Council for Culture concluded that, “the government and the cultural and creative sector [lack] a long-term policy vision for the digital transformation of the sector”. Another risk is that the sector will quickly revert to where it was before the pandemic: focusing primarily on live in-person events. A third challenge is that funds and the necessary (technical) skills are limited, meaning that larger organizations may benefit disproportionately from digitization. In addition, the current energy and inflation crises may further reduce the financial scope for digital investments. Cooperation within the sector is therefore needed to make knowledge and technology available to all, and to share the costs. Also, there is currently still too much dependence on a few large (commercial) platforms (which raises concerns about privacy and autonomy), creators do not earn enough from digitization, and the cultural system is simply not yet properly equipped for it (Raad voor Cultuur 2022).

In order to overcome these barriers, the Council for Culture has made six recommendations,[139] addressed in particular to the national government and at the sector itself (Raad voor Cultuur 2022). In addition, several developments are currently underway that should help to consolidate and accelerate the digital transformation of the cultural sector. In early 2022, the Dutch government introduced Innovatielabs [Innovation Labs], a series of collaborative projects involving various partners. These initiatives aim to foster experimentation with fresh knowledge, technologies, and approaches, ultimately enhancing the adaptability of the cultural sector. Of the 16 projects selected in the first round, several[140] focus on digital transformation. In addition, the cultural digital information desk DigitALL[141] was launched in September 2022: a three-year collaboration between private funds, the lottery company VriendenLoterij, the government, and knowledge partners such as DEN, Art-up and the cultural entrepreneurship platform Cultuur+Ondernemen. The aim of this digital information desk is to provide financial assistance and expertise to those cultural institutions that “want to strengthen their public offer, or contact with the public, through the use of digital technology.”

In the coming years, the focus on digital transformation will be further intensified. In May 2022, State Secretary Uslu announced that, following on from Innovatielabs, she would also invest more than five million euros to “accelerate and support” the digital transformation of the cultural and creative sector (Uslu 2022a). In November 2022, Uslu also announced several additional incentive measures: for example, DEN will receive a structural increase in subsidies to support the sector in its digital transformation, contributions to DigitALL and a training programme will be extended, and facilities for the accessibility of digital heritage will be rolled out more quickly (Uslu 2022b).

139 These are: 1) drawing up a multi-year, strategic digitization agenda; 2) exploring the possibilities for a digital platform; 3) developing and increasing digital skills sector-wide; 4) supporting regional networks of practice; 5) adjusting the grant instruments; 6) supporting and facilitating a cross-sector and industry ecosystem (hub) (Raad voor Cultuur 2022).

140 Some examples are ‘Toolkit for the Inbetween’ (about hybrid cultural experience), ‘Touched by a hologram?’ (about the artistic possibilities of the virtual), ‘Everybody in the (art)house’ (about broadening the audience through digital and hybrid offerings), and ‘Living Lab Open Culture Data’ (on improving the findability of the online offer). See also: https://innovatielabs.org/projects/

141 See https://cultuurloketdigitall.nl

The current commitment to digital transformation, the great opportunities it offers and the challenges that need to be overcome, make it an important issue to monitor. This page contributes to this in a mainly quantitative way, by offering an inventory and discussion of data that provides insight into the digital transformation of the various domains within the cultural sector. We aim to uncover insights into how digital transformation is shaping different facets of the cultural sector, particularly focusing on its influence on the areas[142] of production, distribution, user experiences, audience outreach, and archival practices.

This first version of the page will be further developed, supplemented and updated in the coming years to provide an ever-improving picture of the digital transformation of the cultural sector. However, there will also be aspects of digital transformation that will remain outside the focus of this quantitatively oriented site. In the section "Want to know more about digital transformation?" we refer you to places where you can find more information on this topic.

2. DIGITAL TRANSFORMATION BY DOMAIN

Architecture

Most architecture offices see digital transformation as a major opportunity (BNA 2021, Rutten 2021), and 98 per cent consider digitization to be (very) important (Derix et al. 2022). Perhaps the greatest opportunity lies in the possibility of strengthening the collaboration between the various partners in the construction chain – such as architects, clients, consultants and contractors. This will increase the efficiency and stability of the construction process and reduce the time and cost involved, among other benefits. In practice, the digital applications[143] most commonly used by architects are aimed at digital collaboration. For example, 76 per cent of architectural firms use building information management (BIM)[144] software, 42 per cent work with chain partners using cloud collaboration[145] tools, and 25 per cent digitally link designs to manufacturers' production lines (Rutten 2021). In addition, there is also digital collaboration within the sector. For example, the digiGO[146] programme was launched in 2019 so that government, clients, and the design, construction and engineering sector can work together to help accelerate the digitization of the built environment. This includes work on the Digital System for the Built Environment (DSGO).[147] This is a system of common agreements that will enable the different partners in the construction chain to use and share data securely and reliably.

Digital transformation also offers architects new design possibilities. 23 per cent of architecture firms already have experience with parametric design: a design method where algorithms assist in creating

[142] In this we implicitly follow the creation chain that is introduced in the advice of the Council for Culture on digitization (Raad voor Cultuur 2022).

[143] More information about the digital applications discussed in this section can be found, for example, in the TechArchitect podcast by BNA and Architectuurweb. Each episode focuses on one digital application, such as BIM, parametric design or 3D printing.

[144] BIM enables digital collaboration in the built environment. Information about a building is entered once using open standards, after which this information can be exchanged, managed and (re)used by various partners in the construction process (BIM Loket n.d.).

[145] This can include several things. For example, there is sometimes online collaboration on the same models, design software is linked to manufacturers' software, or a product is developed integrally with the entire construction chain (Rutten 2021).

[146] See https://www.digigo.nu/default.aspx

[147] See https://www.digigo.nu/over+dsgo/wat+is+dsgo/default.aspx

designs by utilizing data and various parameters. This has many advantages. For example, parametric design allows for complex geometric shapes and an algorithm can easily simulate many possible solutions, from which the most (cost) efficient, sustainable or simply optimal solution can be 'calculated'. Other new possibilities offered by digital transformation include, for example, the possibility to bring a design to life through virtual, augmented or mixed reality (already used by 35 per cent of architecture firms), or to monitor and use sensors to track the use of a building (already used by 18 per cent of offices) (Rutten 2021).

The graph on this page shows which digital applications are used most by architecture offices, based on a survey conducted by Rutten in 2021. All applications used by at least 10 per cent of the surveyed firms are selected. The second graph (next page) shows the extent to which architecture and engineering firms say they have digitized their information and data, based on a survey conducted by Statistics Netherlands (CBS 2022a, 2022c).

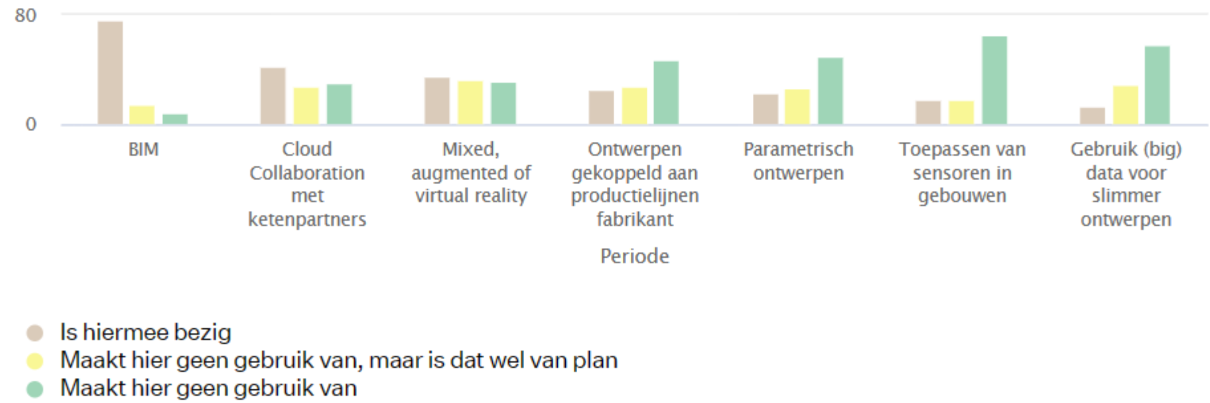


Figure 1. **Digital applications most used by architecture offices, 2021**
% of respondents
[BIM; Cloud collaboration with chain partners; Mixed, augmented or virtual reality; Designs linked to manufacturers' production lines; Parametric design; Applying sensors in buildings; Using (big) data for smarter design;
Period
Already using; Does not use, but plans to; Does not use]

Sources: Rutten 2021, CBS 2022a, CBS 2022c

Although digital transformation offers great opportunities, offices identify several barriers to further or faster digitization. Within the organization, a lack of investment capacity (especially for smaller firms), skills, knowledge and priority are the most frequently cited barriers. For the sector as a whole, chain partners and/or clients not cooperating (to the same extent), and data security issues are also mentioned. The most important needs are therefore knowledge, qualified personnel, support, and cooperation from clients (Rutten 2021).

Figure 2. **Extent to which architecture and engineering offices have digitized their data and information, 2021 and 2022**
% of respondents
[Period;
Not digitized; Average amount of digitization; (Almost) fully digitized; Scarcely digitized; Highly digitized]

Sources: Rutten 2021, CBS 2022a, CBS 2022c

Key barriers to digitization in architecture

The figures on the right show the barriers to digitization faced by architecture firms, both within their own organization and in the industry as a whole (Rutten 2021). Only those barriers mentioned by at least 10 per cent of the responding firms are shown.

Digital transformation also plays an important role in the field of archiving. In Rotterdam, for example, the Nieuwe Instituut is working on the digitization of the National Collection for Dutch Architecture and Urban Planning. This was given an impetus since 2019 by the Disclosing Architecture[148] programme, which focuses on increasing the visibility and accessibility of the architecture collection. Digitization and making the digital collection accessible are important elements of this.

Audio-Visual

As is also described on the Culture Monitor's Audio-Visual domain section, the anti-coronavirus regulations had a major impact on cinema attendance and on the balance of power in the audio-visual sector. Streaming platforms experienced strong growth, both in terms of the numbers of both providers and users, while cinemas saw a sharp drop in attendance.

Figure 1. **Main barriers to digitization at your own architecture firm, 2021**
Share of respondents

[Lack of money to invest; Insufficient expertise within the organization; Does not get prioritized; Lack of knowledge; Lack of overall strategy; No strong business case; Not knowing where to start]
Source: Rutten 2021

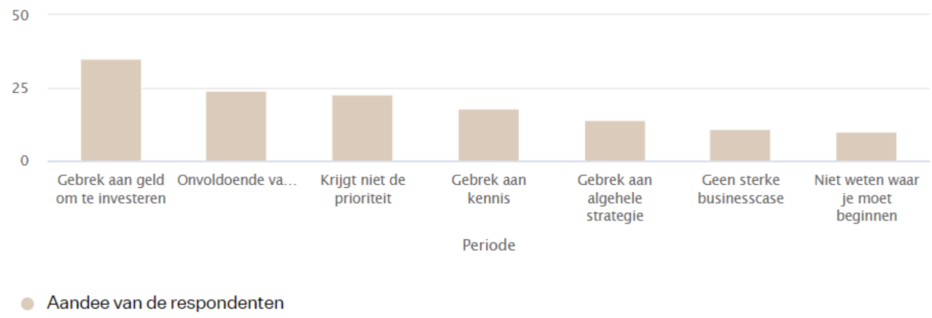
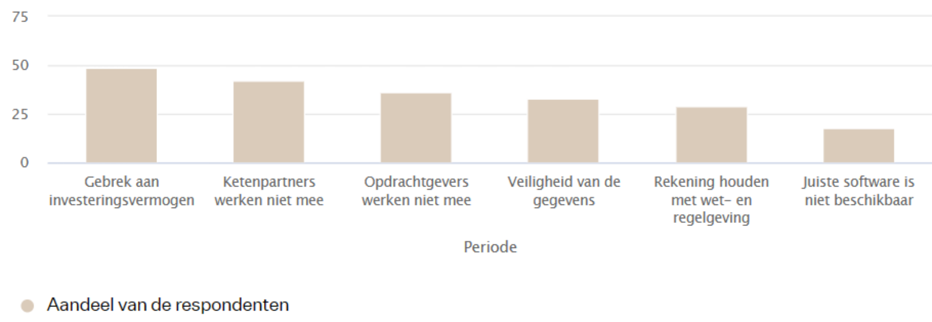


Figure 2. **Main barriers to digitization at your own architecture industry, 2021**
Share of respondents

[Lack of investment; Uncooperative chain partners; Uncooperative clients; Data security; Taking laws and regulations into account; Suitable software is unavailable]
Source: Rutten 2021



[148] See https://nieuweinstituut.nl/en/projects/architectuur-dichterbij

Cinema and video-on-demand ratios

The graph below shows the turnover from cinemas and film theatres and the turnover from video-on-demand services (Mees et al. 2022).

The growth of these subscription video-on-demand (SVOD) providers, which allow you to watch selected titles with a subscription, also continued in 2022. For example, Netflix welcomed 7.7 million new subscribers worldwide in the fourth quarter of 2022, although the platform's subscriber base declined in the first half of the year for the first time since 2011 (by around 970,000) in (Netflix 2023). However, reliable market figures and data on streaming services' performance are limited. For instance, Jonathan Mees of the Film Fund pointed out how challenging it is for producers to determine the viewership of their productions. Netflix,[149] for example, only publishes figures for their top 20 most-watched shows. Efforts to gain more insight into Dutch streaming behaviour are being made, including initiatives by the media research platform Nationaal Media Onderzoek[150] (NMO), which is trying to map the cross-media behaviour of the Dutch population through viewer panels, measurements on TV sets, and other research methods.

It is not only the larger streaming services such as Netflix, Videoland and Disney+ that are popular in the Netherlands: Prime Video, Apple TV+ and CineMember are also on the rise. Streaming services are increasingly bundling the production, distribution and exploitation of audio-visual products, where previously these were separate links in the chain. This transformation reflects a changing balance of power Independent productions, in particular, face challenges as they struggle to secure funding and become tied to a specific audience when they appear on major

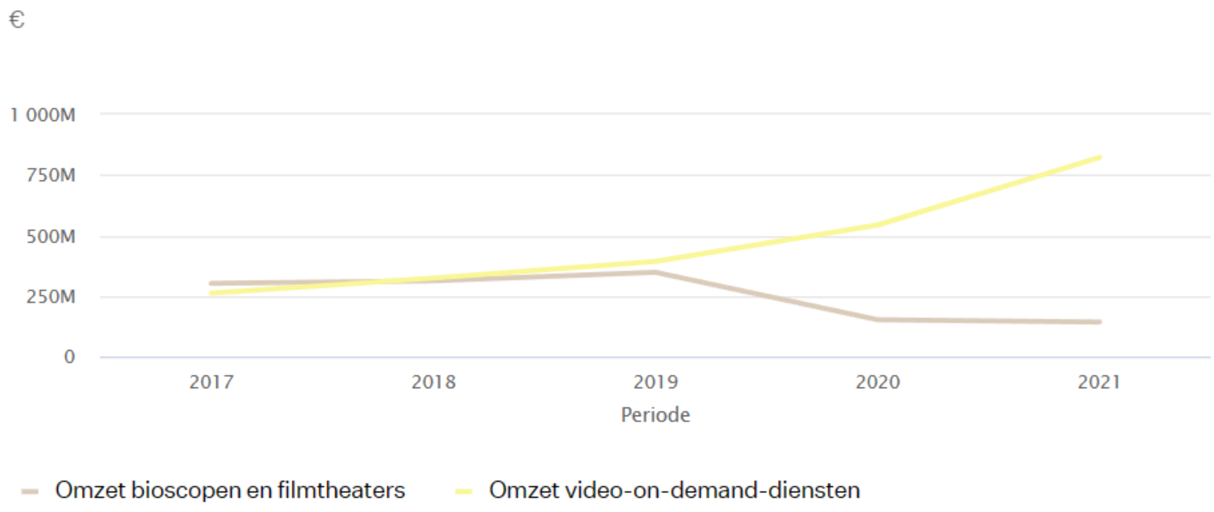


Figure 1. **Turnover cinemas and film theatres and video-on-demand services in the Netherlands, 2017-2021**
[Turnover cinemas and film theatres; Turnover video-on-demand services]
Source: Mees et al. 2022

[149] However, in November 2022, a collaboration between the Broadcasters' Audience Research Board (BARB) and Netflix started. BARB managed to make agreements with Netflix about sharing data about viewing figures (BARB 2022).

[150] An initiative of the KijkOnderzoek Foundation (SKO), the National Listening Research Foundation (NLO), the National Multimedia Research Foundation (NOM) and United Internet Operators (VINEX). For more information, see https://www.nationaalmediaonderzoek.nl/english.

streaming platforms. Looking specifically at documentaries, the panel[151] of the *Documentaire in beweging [Documentary in Motion]* expert session at IDFA 2022 noted: "The streaming platforms have a large and strong international distribution platform, which can be very valuable given the reach of documentaries" (Houtman 2022).

Another recent development is that streaming services such as Netflix are experimenting with release and marketing strategies by simultaneously[152] releasing films in cinemas and online, as happened with blockbuster *The Gray Man* in 2022. In addition, there may be cooperation between cinemas and VOD platforms, with cinemas sharing the revenue. For example, Picl, a transactional video-on-demand (TVOD) platform where you pay once to watch a film, only releases[153] films that are currently playing in cinemas. The platform gained popularity during the pandemic and demonstrates the various benefits of virtual cinema: better and more accurate data management, great opportunities for (international) collaboration, and the ability to show more films and diversify[154] the range. Picl is also currently investigating where and when in the selection process a viewer decides to watch a film on- or offline. In this context, Koen de Groot (NVPI) notes that, before the pandemic, streaming services had little impact on cinema attendance: the most enthusiastic streamers were also the most frequent cinema-goers. However, the pandemic has really turned everything upside down – bigger films still attract audiences, but life has become a lot more difficult for smaller films. Dutch cinemas attracted 25 million visitors in 2022; 32 per cent less than the 2017-2019 average, but 75 per cent more than in 2021[155] (NVBF et al. 2022, 2023).

Although streaming platforms have many users in the Netherlands, the big 'traditional' TV channels such as NPO, RTL and Talpa still attract more viewers according to SKO (Stichting Kijkonderzoek) (Melchers 2022). The 'cord-cutting' trend – cancelling one's subscription to linear TV and only watching TV online – is also less prevalent in the Netherlands than in the US. However, there is a slight decline[156] in linear television viewing: research by the Dutch media authority (Commissariaat voor de Media, CVDM) shows that the preference for TV has decreased in 2022 compared to 2019, and the preference for social media platforms and on-demand services has increased. For viewing news and information, television is still preferred over other ways of viewing, although the preference for viewing news and information on social media platforms increases strongly in the youngest age group (13-19 years).[157] We also see that this youngest age group is the most likely to use YouTube and Netflix to watch videos – although these platforms are also widely used in the 20-34 and 35-49 age groups. In 2019, there were still five linear TV

[151] Furthermore, the panel members, including documentary filmmakers Ester Gould and Ahmet Polat, stated that these platforms often devote the most marketing attention to productions that are fully financed by them and less to projects that also involve other financiers. The panel was organized by NAPA, DDG and IDFA (Houtman 2022).
[152] However, this 'day-and-date' strategy has not proven to be a successful strategy for studios, says Koen de Groot (NVPI): they now want to benefit more from an exclusive release in the cinema.
[153] This applies to major releases; however, they may still have older films in their offer.
[154] For example, Picl says that digital distribution makes it easier to allow experimentation in addition to 'regular' programming, such as Pepr, a programme with a focus on Black cinema, or the NFF debut competition, aimed at young talent.
[155] In 2021, cinemas were closed for 24 weeks, in 2022 from the beginning of the year until January 25.
[156] Figures from SKO also show that there is a decline in linear TV-watching behaviour (SKO 2022, 2023).
[157] For the first time since 2017, the results of the study show that smartphone use among young people aged 13-19 exceeds the use of the TV screen for watching video content. Smartphone use is also increasing in all other age groups for watching TV and online video. (Slabbekoorn et al. 2022).

channels in the top ten channels and services most watched by the youngest age group of television viewers; in 2022, there were only three (Slabbekoorn et al. 2022).

Digital developments are also taking place in the field of archiving. A 2020 survey shows that the rate[158] of digitization of audio-visual material increased between 2017 and 2019. In 2019, 42 per cent of the respondents – including the Dutch Institute for Sound and Vision and the Eye Film Museum, but also government archives and broadcasters – said they had digitized more than half of their analogue audio-visual material, compared to 34 per cent in 2017. The level of digitization is particularly high among broadcasters: 55 per cent had digitized more than half of their analogue audio-visual material. Respondents representing other institutions also report a high level of digitization: 64 per cent of them had digitized more than half of their analogue audiovisual material (Mulder et al. 2020).

Level of digitization of audio-visual archives

The figures below show, based on a small-scale survey (N=67), what percentage of their archives the institutions surveyed had digitized in 2019. For example, the graph shows that 20 per cent of the surveyed museums had digitized up to a quarter of their archives (Mulder et al. 2022).

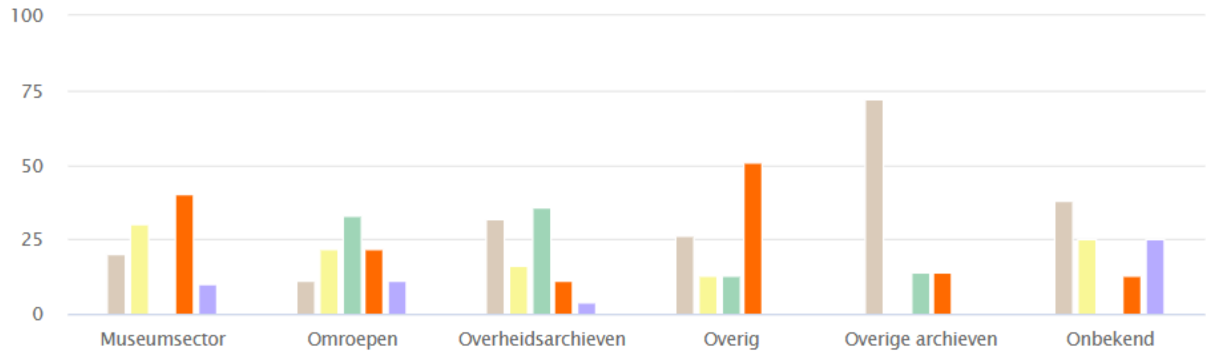


Figure 1. **Level of digitization of audio-visual archives, 2019** % of all respondents
[Museum sector; Broadcasters; Government archives; Other; Other archives; Unknown; 0-25 per cent; 25-50 per cent; 50-75 per cent; 75-100 per cent]
Source: Mulder et al. 2022

[158] Regarding the material still to be digitized per institution, it is striking that government archives in particular still have to digitize a great deal of analogue audio-visual material. Broadcasters indicate relatively often that they do not intend to digitize more material, or that they only do so on request (Mulder et al. 2020). See also Blokland 2022.

Visual arts

During the coronavirus years, museums and presentation facilities had to close – initially a strange circumstance for places focused on offering a physical experience. Institutions[159] quickly developed a variety of online museum experiences: virtual tours of exhibitions, accelerated digitization of the collection and related website updates, increased social media presence, and increased attention to digital heritage and its accessibility (sometimes grouped under the trendy term 'living archives',[160] the opposite of a closed archive with little interaction or activation). Museums and exhibiting institutions,[161] with or without pandemic support, focused on additional resources for digital presence. To what extent has this focus continued? And will visitors cross the physical threshold just as easily as before the crisis? Unfortunately, the answer to the latter question is not yet a resounding 'yes'.[162] The Museum Association (Museumvereniging) estimates visitor numbers[163] for 2022 at between 18.2 and 23.8 million, compared to 32.6 million in 2019 (Verhoog et al. 2022).

Museum visits

The graph on the right shows the number of museum visits in the Netherlands for the years 2019, 2020 and 2021, in addition to the estimated number of visits in 2022 (Verhoog et al. 2022). We see that in 2021[164] three quarters of museums offered online activities: read more about this in the Heritage section of this page. The percentage of their collections that museums made accessible online depended on the size of the museum (Verhoog et al. 2022).

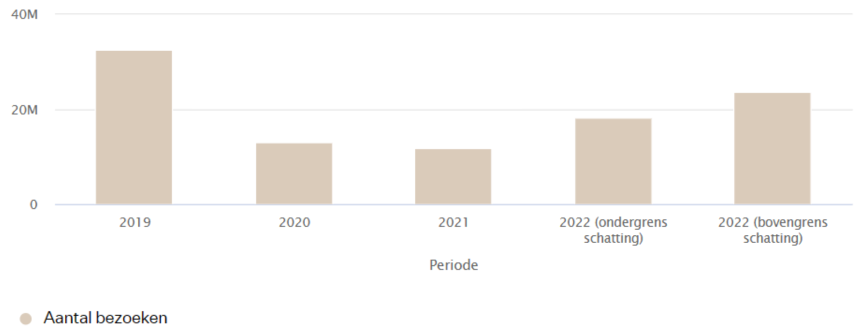


Figure 1. **Number of museum visits in the Netherlands, 2019-2022**
Total visitors
[Period; 2022 (lower estimate); 2022 (upper estimate)]
Source: Verhoog et al. 2022

[159] In the text, 'institutions' refers to Dutch museums and exhibiting institutions, unless otherwise specified.

[160] In 2022, for example, De Appel held the exhibition and activation of its archive, called *Catching Up in The Archive*, in which physical publications were opened up as both exhibition artifacts and objects that visitors could work with themselves. There was also the exhibition *Open Archives 3.0* and the symposium *Disclosing Futures Rethinking Heritage* at the Nieuwe Instituut.

[161] This text largely focuses on the (accelerated) digitization in museums and exhibiting institutions and only to a lesser extent on the gallery business, the market and other aspects of the visual arts field.

[162] Some museums manage to attract new (read: young) target groups, including Nxt Museum, Amsterdam or extremely Instagrammable places such as Remastered in Rotterdam and Fabrique des Lumières on the Westergasterrein, Amsterdam (Kroesbergen et al. 2022). The Museum Association also qualifies this picture of declining visitor numbers: museums that had just undergone renovations or were able to offer special programming to the public did particularly well. Other museums with good visitor numbers in 2022 include the Drents Museum, Amsterdam Museum, Singer Laren and Naturalis (correspondence with the Museum Association).

[163] These numbers include all museums, not just the art museums.

[164] In 2022, these numbers will have logically decreased, as museums were able to reopen to the public from 26 January 2022 and they attempted to help the public find their way back with attractive, innovative offerings in the form of live visiting experiences.

Digital accessibility of museum collections
The graph on the right shows the percentage of collections that museums have made publicly accessible online, by museum size. For example, large museums have made 78 per cent of their collections digitally accessible. These figures do not include two large museums that have significant backlogs in digitizing their collections (Verhoog et al. 2022).

The digital museum offerings[165] that proved most popular with visitors after the start of the pandemic were social media activities (mentioned by almost 60 per cent of surveyed museums in Europe),[166] followed by video content (42 per cent) and virtual tours (28 per cent). In terms of supply, the number of social media posts increased (67 per cent of museums), as did the amount of video content (39 per cent of museums) (Nemo 2021). In 2021, three quarters of Dutch museums, or 59 per cent of small museums, offered at least one online activity. The number of visitors to museum websites increased from 126 million in 2019 to nearly 149 million in 2021 (Verhoog et al. 2022).

Looking beyond the (art) museums, more than 54 per cent of art galleries appear to have experienced a greater or lesser decline in physical visits, although the number of staff has remained virtually the same. Art sales[167] are increasingly shifting online: online sales almost doubled in a year and, in 2020, 22 per cent of galleries generated half or more of their sales from the internet (Dijksterhuis et al. 2022).

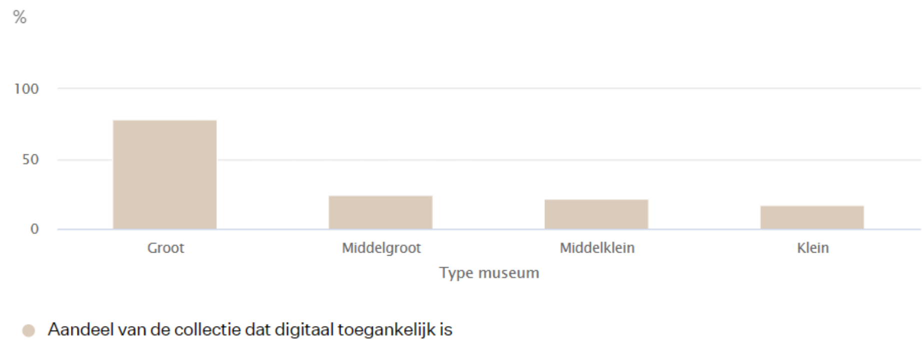


Figure 1. **Share of the permanent museum collection accessible online by size of museums, 2021**
Share of the collection that is digitally accessible
[Large; Medium-large; Medium-small; Small; Type of museum]
Source: Verhoog et al. 2022

For museums, an online offer and digital presence has an important added value: international reach. Interestingly, some smaller institutions see this reach as one of the main reasons to not only (continue to) organize hybrid cultural events where online and offline visitors can experience the programme together, but even to go completely online. One example is The

[165] However, more than 8 out of 10 (European) museums indicate that they need extra support with digital tools for digital transformation; specifically, more than 40 per cent say they need help building a digital strategy, followed by the need for a new digital infrastructure (23.2 per cent) and staff training (18.7 per cent) (Nemo 2021).
[166] These figures concern European museums, not just Dutch museums. For figures on the offerings of specific Dutch museums, see the Heritage section of this theme page.
[167] The art-market report Onderzoek Kunstmarkt 2021 also reports that the coronavirus pandemic has accelerated the digitization of the gallery sector: more time and money has been invested in social media, gallery websites, and participation in the online viewing rooms of fairs and platforms such as Artsy and GalleryViewer. 7 per cent of galleries switched to online sales during the pandemic and an equally large group are considering that step in the future. A fifth of galleries achieved half of their turnover through digital sales channels in 2020 (Dijksterhuis et al. 2022).

Hmm,[168] a platform for inclusive internet culture. Its freedom in hybrid experiments, including the event The Hmm @ 4 locations (organized simultaneously in four locations in the Netherlands and online), has been admired by larger cultural institutions, who see it as a breeding ground for their own digital portfolio.

In addition to a wider international reach, virtual experiences also have the potential to increase the accessibility of events and offer opportunities to reduce the environmental footprint of speakers and visitors. Esther van Rosmalen of Witte Rook, a foundation in Breda, sees this playing a role in artist residencies too. Her artists have realized that it is perfectly possible to work digitally during the (initial) research phase, which opens up the principle of time, space and context, as well as enabling a wider reach for artists who are not based in the Netherlands or Europe.

One inspiration for Witte Rook is the Museum for Contemporary Art (Museet for Samtidskunst)[169] in Roskilde, Denmark, which has abandoned its physical exhibition space to focus on a major online component: a website that provides additional context for the works, more than is possible in a physical exhibition, and presents them in a more multimedia way. In addition, experiments with adding digital applications or immersive experiences[170] to exhibitions have proliferated in recent years, including the use of VR or AR in museum installations, live streams, performances or a so-called museum of the future.[171] However, the big question[172] remains: how to make money[173] from these online expressions? The Museum Association agrees, but also sees how online experiments can serve as a way to deepen the visitor experience and offer a first, low-threshold contact with the museum.

Design

Digitization has long been an ongoing process, and the broader design sector in particular has been at the forefront of new innovations and developments. The Creative Industry Monitor 2021, for example, describes digitization as the main axis along which innovation in the creative industries takes place (Rutten 2022, 13). Design is the fastest growing sector in the creative industries, and the emergence of digital design – where design skills are combined with digital skills such as software development and the application of artificial intelligence (AI) – has put design on the map more than ever before (Rutten 2022, 34). However, digital transformation is now part of almost every design practice,[174] whether as a working tool or as a goal to be pursued within one's own design. The extent and form in which digitization is used in design practice varies according to the subcategories of workers and

[168] The Hmm publishes research files on hybrid events and low tech, and together with MU, Eindhoven and Affect Lab, organizes The Toolkit for the Inbetween, a research project on hybrid experiences. This also happens in Ga Hybride! [Go Hybrid!]: a study into hybridity within the cultural sector with partners such as Hackers and Designers, IMPAKT, Varia, the Willem de Kooning Academy and the Institute for Network Culture.

[169] See more information here: https://www.samtidskunst.dk/

[170] This enrichment of the museum experience can go in many directions. There is a trend towards more immersive art, in which a multi-sensory experience is offered to visitors by means of sound, images and projections. Specifically, the new Museum M in Almere aims to take this direction, but there are several examples to be found, such as the aforementioned Nxt Museum.

[171] A project of the Dutch Institute for Sound and Vision, for more information see https://beeldengeluid.nl/en/knowledge/blog/museum-future-social-virtual-reality-unlock-shared-cultural-heritage-experiences.

[172] Something that is also endorsed in the report of the Council of Culture on digitization (Raad voor Cultuur 2022) and the recommendations for digital transformation from the Rotterdam Council for Art and Culture (RRKC 2022).

[173] The Museum Association has had concrete discussions about this: for example, it facilitated the podcast on the power of hybrid presenting during the Museum Congress 2022. For more info, see https://open.spotify.com/episode/6C92ZAebtNhJFZbQywvOhB. It also raises interesting questions: What exactly do you classify as an 'online' visit? Visits to your website and social media engagement? Or does it only count when the online visitor makes a financial transaction to attend a certain online activity?

[174] This was confirmed in discussions with the sector for this theme page.

companies in the design sector[175] – varying, for example, from an independent illustrator to an agency that designs signage for airports.

Due to the versatility of the field and the many intermediate forms and overlaps with other sectors (both within and outside the cultural sector), figures on the sector-wide digital transformation of design are difficult to visualize, still the Creative Industry Monitor has been reporting on the digital design industry and its remarkable growth since its first publication in 2014. Statistics in this sector[176] are also difficult to track, because some companies are registered as software developers, others as advertising agencies and still others as designers (Rutten 2022, 122).

It is important for designers to collaborate with other disciplines within and outside the design field in order to (help) solve so-called wicked problems[177] and address societal challenges. There are numerous innovative, tech-savvy (social) design projects in which digitization or digital innovation plays a specific role in the collaboration. A small selection from the *Dutch Designers Yearbook 2022* (Kroesbergen et al. 2022) includes, for example, the Solar Biennale/The Energy Show in the Nieuwe Instituut and acclaimed projects from the Dutch Design Awards such as WTFFF!?, BuyCloud and the work of Cream on Chrome.

Striking trends[178] in digital transformation and design[179] that emerge in further discussion with the sector on this theme page include, for example, the rapid advance of AI (which some designers welcome as a 'new colleague', but which others see as a threat); experimentation with, and the application of, immersive content (the CIIIC programme is being set up to support this); data-driven work (which is becoming increasingly important for many different design practices); digital co-creation platforms[180] and circular design chains; as well as the impact of the pandemic on digitization.

The pandemic acted as a catalyst for positive change in the design sector, in design processes, the communication about these processes, and in the focus of designers. The lockdowns temporarily gave designers the space to do more research, experiment, work on their own projects or give their practice a different focus – as Madeleine van Lennep, director of the BNO, notes in the *Dutch Designers Yearbook 2022* (Staal 2022). One striking consequence of the pandemic was

[175] The Industry Monitor of the Association of Dutch Designers (BNO) uses the following main categories within the design field: communication and/or graphic design, service and/or experience design, product and/or industrial design, spatial and/or interior design, and architecture. Which specific professions fall under these categories can be found in the BNO Branchemonitor 2022 (BNO 2022).

[176] Digital design agencies in the Netherlands are united in the trade association Dutch Design Agencies (DDA), which regularly conducts research among its members. For example, DDA reports that the growth of turnover of digital design companies in 2020 almost came to a standstill due to the pandemic (a growth of 0.6 per cent), but picked up again in 2021 to 9.9 per cent and that, notwithstanding the pandemic, the industry managed to keep its workforce on board in 2020 (Weert 2021, Rutten 2022). However, these figures should be approached with caution, because only agencies with a turnover of a certain size and higher are affiliated with DDA. There are also relatively many small players operating in the field of digital design that remain out of the picture (Rutten 2022, 122).

[177] Wicked problems are tough issues that are difficult to solve because they are difficult to structure or manage.

[178] The trends that are currently playing in the design sector are further elaborated in a new 2023 version of the Design domain page of the Culture Monitor.

[179] Interesting to mention here is the Network Archives Design and Digital Culture (NADD), founded in 2020 on behalf of the Ministry of Education, Culture and Science (OCW). This organization, which operates from the Nieuwe Instituut, focuses on collecting the heritage of the design and digital culture sectors. This is essential for accessible knowledge sharing about these sectors, since there was no central vision concerning this in the sector before.

[180] Co-creation platforms are also a digital application within the design field. Think of the online UI design tool Figma and virtual spaces such as NEOS VR in which real-time co-creation is possible, regardless of location, and which has a huge number of users worldwide. With the emergence of the Metaverse, designers are increasingly looking at a more three-dimensional world and how to achieve this together. VRChat, a platform even bigger than NEOS VR, is mainly used for designers to publish and share VR spaces that they are working on, not for co-design.

therefore the (slight) increase in the number of grant applications to the Creative Industries Fund NL, especially in the 'design' category, and specifically for grants for projects in which designers reflect on their practice (see the graph below). Designers' digital skills are above average and the BNO Branch Monitor 2022 shows that hybrid working has become standard at 84 per cent of design agencies since the coronavirus (Hattum et al. 2022). However, the pandemic has also caused a labour shortage: agencies have many unfilled vacancies, and there is a particular demand for creative talent (Ibid.). Digital creators, especially those who program and can earn a high income in a short period of time, have chosen to retrain or simply change jobs[181] during or after the pandemic. On the one hand, the pandemic has caused practices to come to a standstill or collapse, and on the other, it created a great deal of mobility and demand in the labour market.[182]

Creative Industries Fund NL subsidies

This graph shows the number of subsidy applications for project programmes for the categories 'design' and 'digital culture' within the Creative Industries Fund NL. The figures refer to the number of applications processed. Design had five rounds in 2020; this was reduced to four in 2021. The restrictive measures against the coronavirus came into effect after round 2 and round 3 in 2020 for digital culture and design respectively.

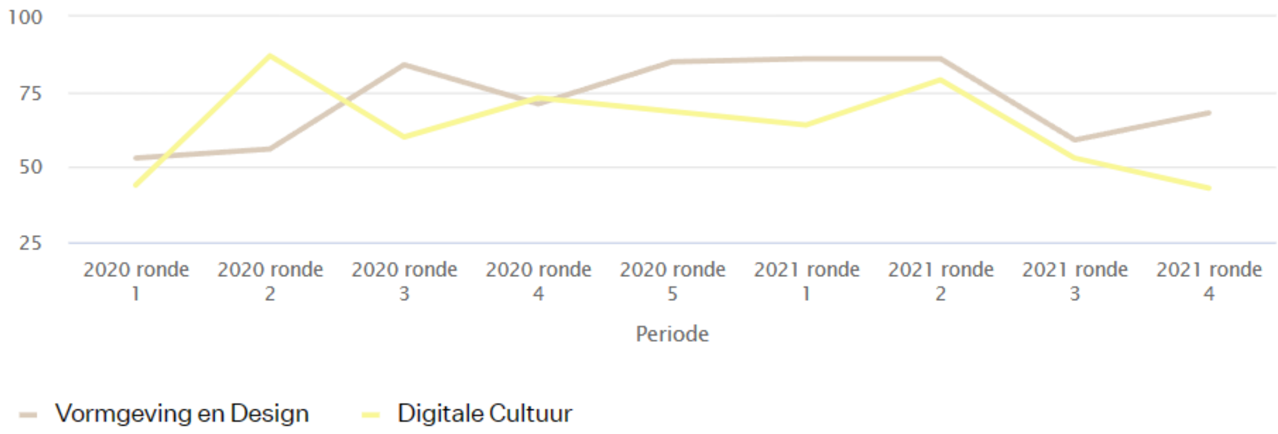


Figure 1. **Applications for Creative Industries Fund NL project provision, 2020 and 2021**
[Period; 2020 rounds 1-5, 2021 rounds 1-4;
Design; Digital Culture]
Source: Creative Industries Fund NL

[181] So Joris van Ballegooijen, head of subsidies at the Creative Industries Fund NL, told us in discussions for this theme page.
[182] This was confirmed by Madeleine van Lennep, director of BNO, in discussions for this theme page.

Heritage

Heritage reflects and tells stories about ourselves and the way we as a society view our environment. Digital transformation plays an important role in telling these stories. Digitization also helps to preserve heritage for the future, but most importantly it ensures that heritage collections can be linked together, become more accessible, and enable users to tell new, more diverse and richer stories about heritage (Network Digital Heritage 2021). Through the National Digital Heritage Strategy – implemented by the Digital Heritage Network (NDE)[183] – the heritage sector is working to connect heritage collections from a user perspective, in order to make them easier to find and to increase their use. Key concepts here are 'sustainable', 'visible' and 'usable'.

The term 'sustainable' encompasses the long-term preservation and availability of information resources. It is difficult to say exactly to what extent this has already been achieved in the cultural heritage sector, but some figures are available, with the necessary caveats.[184] In 2017, for example, half of the 127 Dutch heritage institutions surveyed had digitized up to a quarter of their collections; the average digitization rate was 35 per cent (DEN 2017). A 2021 study found similar percentages, with 57 per cent of the organizations reported having digitized up to a quarter of their collection (Kemman et al. 2021).

However, as soon as we zoom in on museums it becomes clear that it is actually very difficult to interpret these figures. The 2021 survey mentioned above found that half the museums surveyed had digitized at most a quarter of their collections (Kemman et al. 2021). Figures from the Cultural Heritage Agency of the Netherlands (RCE), however, indicate that a significant proportion of the total museum collection[185] has been digitized: rising from 54 per cent at natural history museums to 81 per cent at ethnological museums in 2020 (RCE 2021a). There are several possible explanations for this difference.[186] While it's challenging to pinpoint the precise percentage, digitization is on the rise in the majority of heritage institutions. In 2021, it had increased in 53% of the surveyed institutions when compared to 2019, remained relatively stable in 35%, and decreased in 10%. (Kemman et al. 2021).

The following graphs show some figures related to the percentage of digitization in heritage collections in the Netherlands. Figure 1 shows how the surveyed heritage institutions estimate the percentage of digitization in their collections (DEN 2017, Kemman et al. 2021). Figure 2 shows the percentage of digitization of museum collections by type of museum (RCE 2021a). Figure 3 shows the responses to the question of how, according to cultural heritage institutions, the percentage of digitization of their collection has changed between 2019 and 2021 (Kemman et al. 2021).

[183] https://netwerkdigitaalerfgoed.nl

[184] These figures are based on random samples and self-assessment. The degree of digitization at heritage institutions can differ per collection (as no distinction is made between the size of collections) and the figures do not provide insight into the level at which digitization has taken place (and whether digitization, for example, refers only to digital metadata or a complete digital reproduction) (Mulder et al. 2019, Kemman et al. 2021).

[185] The government Information and Heritage Inspectorate also writes about the national collection: "Digital images of large parts of the national collection are available for registration and identification purposes; in many institutions the collection has been photographed entirely or almost entirely" (Inspectie Overheidsinformatie en Erfgoed 2022).

[186] For example, the question and the definition of digitization may have differed in the two studies, the population that completed the survey differs (the survey by Kemman et al. 2021 seems to have mostly been completed by smaller institutions), and both studies have a different starting point. The figures from Kemman et al. 2021 show which part of the collection has been digitized per institution, while the figures from RCE 2021a show which parts of all collections have been digitized together. An institution with a large collection and a high degree of digitization should therefore raise the average.

However, not all digitized heritage is publicly accessible and visible. In a 2017 survey, heritage institutions reported that, on average, 37 per cent of their digital collections were accessible online (DEN 2017). The percentage of total museum collections that is publicly accessible online is roughly comparable, ranging from 33 per cent for history museums to 65 per cent for ethnology museums in 2020 (RCE 2021b). However, these figures are difficult to interpret, because the specifics of *what* is digitally accessible can vary greatly from one collection to another. For example, in 2021, 29 per cent of cultural heritage institutions focused entirely or mainly on quantitative access,[187] while 36 per cent focused entirely on mainly qualitative access[188] (Kemman et al. 2021).

Another way to gain insight into the scale of publicly accessible digital heritage is to look at a few large platforms that aggregate different digital collections. For example, by summer 2023, more than 6 million objects from the collections of around 200 museums and other cultural institutions were searchable on CollectieNederland.nl. In addition, around 53 million digital objects from all over Europe

Figure 1. **Percentage of digitization in heritage institution collections, 2017 and 2021**
% of respondents
[Period;
0/1-5/6-25/26-50/51-75/76-99/100 per cent]

Sources: DEN 2017, Kemman et al. 2021, RCE 2021a

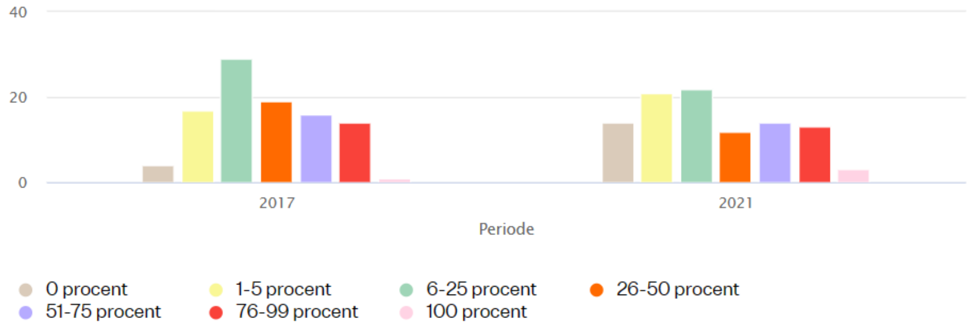
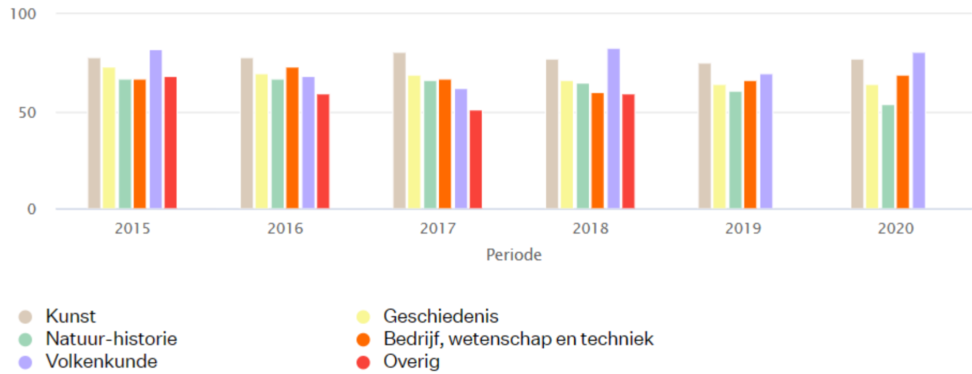


Figure 2. **Percentage of digitization in museum collections, 2015-2021**
[Period;
Art; Natural history; Ethnology; History; Industry, science and technology; Other]

Sources: DEN 2017, Kemman et al. 2021, RCE 2021a



[187] "Presenting as much digital heritage as possible with limited descriptions."
[188] "Presenting a (limited) selection of digital heritage (...) with rich, contextual information."

are accessible via Europeana, of which more than 9.6 million came from 94 Dutch institutions in July 2022 (Europeana Foundation 2022).

Much is being done to make this heritage more visible. For example, the Geheugen van Nederland [Memory of the Netherlands] campaign aims to highlight the countless stories contained in digital heritage. The pandemic also provided an opportunity to introduce the public to online heritage. For example, a large proportion of the museums offered online activities in 2020 – although this offer seemed to decrease slightly in 2021 (CBS 2022d).

Figure 3. **Development of digitization rate in heritage collections, 2019-2021**
% of respondents
[Increased, because a lot has been digitized;
Increased, because the born-digital collection has become a larger part of the total;
Stayed roughly the same, because although there has been some digitization, the analogue collection has grown about the same amount;
Stayed roughly the same, because while there has been no digitization, the analogue collection has also not grown;
Decreased, because the analogue collection has grown faster than the digital collection;
Decreased, because there has been no digitization and the analogue collection has increased;
Other]
Sources: DEN 2017, Kemman et al. 2021, RCE 2021a

Museums' digital provision

The first graph on the right shows what percentage of museum collections are publicly accessible via the internet, broken down by type of museum (RCE 2021b). The second graph shows the specific online activities offered by all museums in the pandemic years 2020 and 2021 (CBS 2022d).

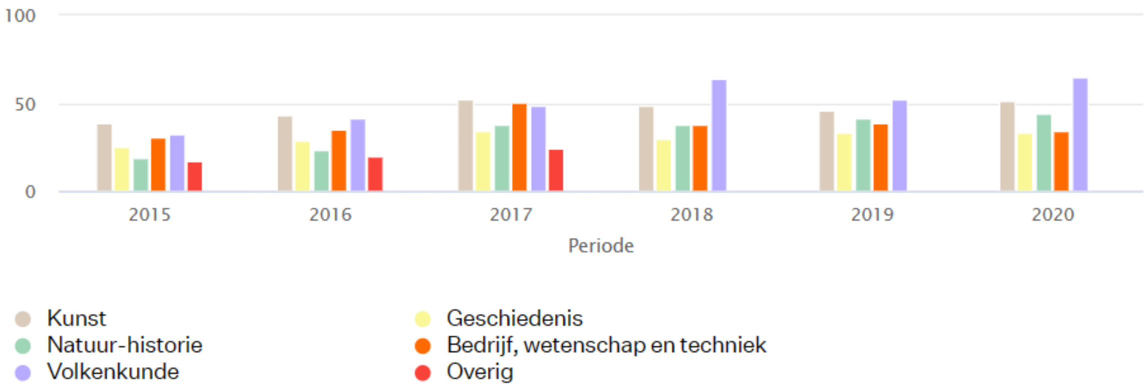


Figure 1. **Percentage of museum collections accessible via the internet, 2015-2020**
[Art; Natural history; Ethnology; History; Industry**,** science and technology; Other]
Sources: RCE 2021b, CBS 2022d

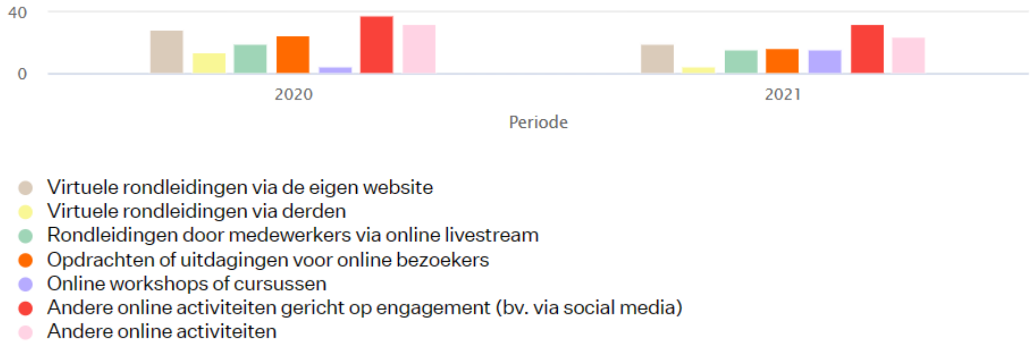


Figure 2. **Percentage of museum collections offering online activities, 2020-2021**
[Virtual tours via the museum's own website;
Third-party virtual tours;
Guided tours by employees via online live stream;
Assignments or challenges for online visitors;
Online workshops or courses;
Other online activities aimed at engagement (e.g. on social media);
Other online activities]
Sources: RCE 2021b, CBS 2022d

The aim of these efforts is to encourage users to make use of what is available. In recent years, several studies have been carried out with the aim of arriving at a standardized way of measuring this use (Graauw et al. 2020, Huysmans 2021, Graaf 2022).

The findings so far fall into three categories: reach figures, research findings, and qualitative research results based on interviews. Firstly, the reach figures are the number of visitors who visit digital heritage websites, and the number of pages they view. The figures are shown in the graph[189] on the right.

Reach of digital heritage collections

This figure shows the average number of heritage items, visitors, page views and sessions on heritage and mixed websites in 2020 (Kemman et al. 2021). The National Library figures are not included as they are exceptionally high and would distort the average (Kemman et al. 2021).

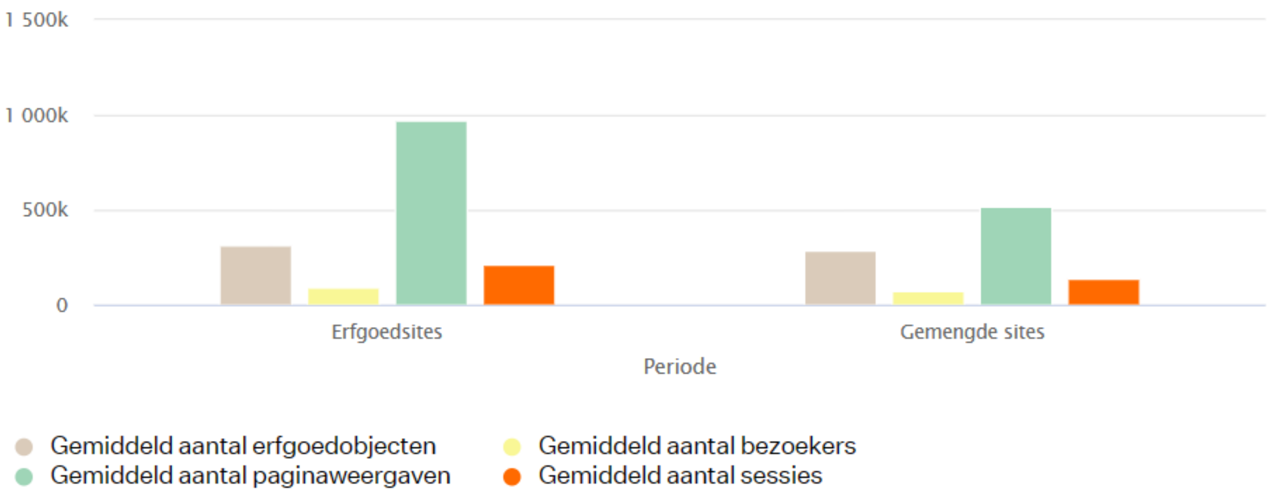


Figure 1. **Average reach of heritage websites, 2020**
Averages
[Heritage Sites; Mixed sites;
Period;
Average number of heritage objects;
Average number of visitors;
Average number of page views;
Average number of sessions]
Sources: Kemman et al. 2021, Graaf 2022

[189] Explanation of definitions in the graph below:

- Unique visitors: a unique visitor is a user who has visited the website at least once in a certain period of time;
- Page views: the number of pages on a website viewed by visitors;
- Sessions: a session is a visit by a user;
- Heritage site: a site “on which mainly digital heritage is offered”;
- Mixed site: a site that contains both ‘corporate’ information and digital heritage.

See Kemman et al. 2021, as well as Govers 2017 and Graaf 2022 for other studies on the reach of heritage sites.

Secondly, are the research findings. These show,[190] for example, that 96 per cent of the population is interested in heritage to some degree, that a significant proportion of people are involved in heritage activities, and that the majority use the internet to do so. In particular, there is a lot of browsing and searching for information, reading articles and looking at photos and videos. In order to clearly map this use, the NDE has developed user profiles for dealing with digital heritage. By far the most common of these profiles are 'Intensive experience',[191] 'Browsing and discovering',[192] 'Obtaining targeted information',[193] and 'Around physical visits'.[194] Less common are 'Sharing',[195] 'Creating with objects',[196] 'Co-creating in community',[197] 'Learning',[198] 'Gaming',[199] and 'Creating with datasets'[200] (Mulder et al. 2019, Kemman et al. 2021).

Use of digital heritage

The graphs on the next pages show insights into the use of digital heritage derived from the survey research. The first figure shows the heritage activities that respondents practice, and the extent to which they use the internet to do so (Kemman et al. 2021). The second figure shows the most common ways in which the internet is used (Kemman et al. 2021). Finally, the third figure shows nine ways of dealing with digital heritage, and the proportion of respondents who sometimes use them. There is a small difference between the 2019 and 2021 data. The data for 2019 concerns the proportion of respondents compared to the group of people interested in heritage. The data for 2021 concerns the proportion of respondents compared to the group of people who sometimes use the internet for their own heritage activities (Mulder et al. 20219, Kemman et al. 2021).

Lastly, the third category refers to interview-based research. This provides more qualitative findings about how different target groups, including academics, people with a creative profession, and teachers, interact with digital heritage in terms of both usage extent and methods (Mulder et al. 2019, Kemman et al. 2021).

[190] This data is based on user research among approximately 1,500 respondents (Mulder et al. 2019, Kemman et al. 2021). In addition, figures on heritage participation are available from Statistics Netherlands' VrijeTijdsOmnibus (see also the theme page Culture and participation').
[191] "I sometimes enjoy images and/or videos about historical matters."
[192] "I look around the internet for information on cultural heritage and then click through to information I want to know more about."
[193] "I search the internet specifically for specific information about cultural heritage that I want to know or see more about."
[194] "I'm looking at the website of a museum, archive, library in preparation for a visit."
[195] "I sometimes share information about cultural heritage with others on the internet."
[196] "I use text, images or videos on the internet in the field of cultural heritage to make/create something myself."
[197] "I participate in a community on the internet that collects and/or describes historical digital objects."
[198] "I'm following a course or educational programme related to cultural heritage and also use the internet for that."
[199] "I play games on the internet that are about cultural heritage."
[200] "I create apps, datasets or archives with data from cultural heritage objects."

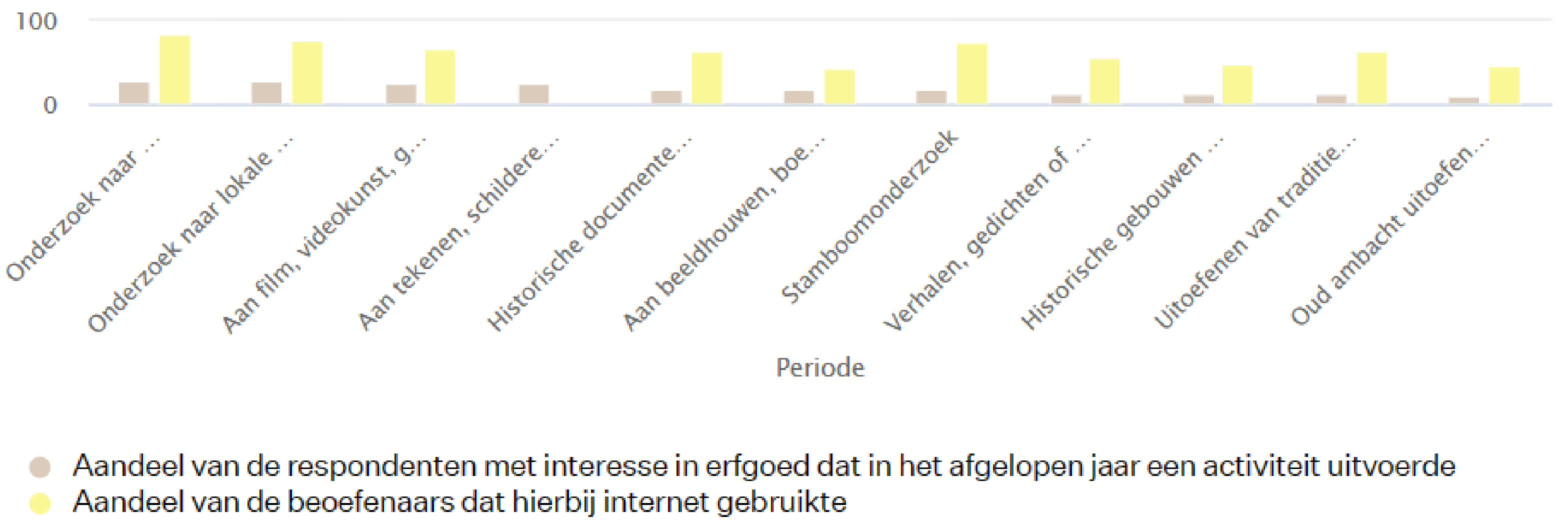


Figure 1. **Heritage activities practiced and use of the internet for this, 2021**

%

[Researching historical people/events: 29	Percentage of practitioners using the internet for this: 84;
Researching local or regional history: 28	Percentage of practitioners using the internet for this: 76
Film, video art, graphic design on computer or photography: 28	Percentage of practitioners using the internet for this: 66
Drawing, painting, graphic work not on computer: 26	
Gathering historical documents or objects: 18	Percentage of practitioners using the internet for this: 64
Making sculptures, models, ceramics, jewellery or textiles: 17	Percentage of practitioners using the internet for this: 43
Family tree research: 17	Percentage of practitioners using the internet for this: 74
Writing stories, poems or weblogs about the past: 13	Percentage of practitioners using the internet for this: 57
Restoring historic buildings or objects: 13	Percentage of practitioners using the internet for this: 48
Practicing traditions, customs, crafts: 12	Percentage of practitioners using the internet for this: 63
Practicing/demonstrating old crafts or historical events: 11	Percentage of practitioners using the internet for this: 45]

Beige = Percentage of respondents with an interest in heritage that carried out an activity in the past year
Yellow = Percentage of practitioners who used the internet for this.

Sources: Mulder et al. 2019, Kemman et al. 2021

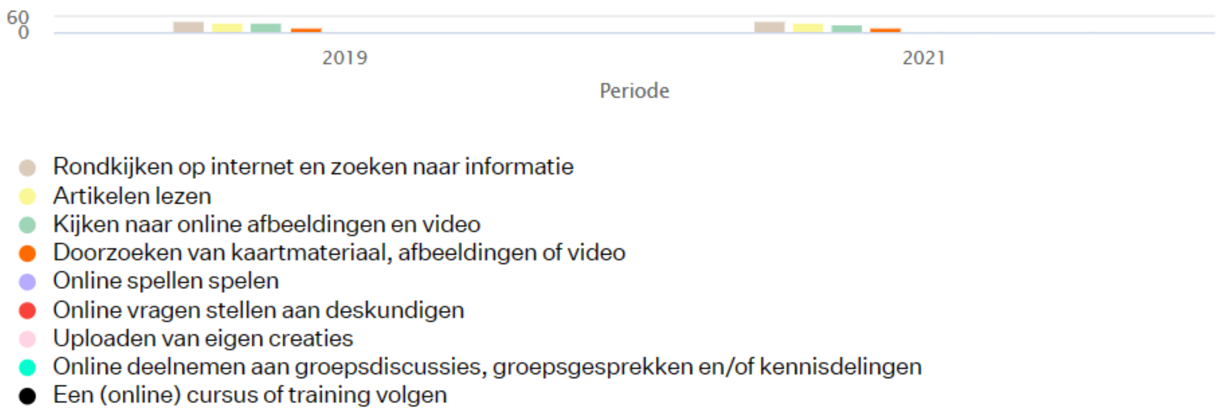


Figure 2. **Ways in which the internet is used in heritage activities, 2019 and 2021**
% of respondents
[Period;
Browse the internet and search for information;
Read articles;
Watch online images and video;
Search through maps, images or video;
Play online games;
Ask experts questions online;
Upload your own creations;
Participate in group discussions, conversations and/or knowledge-sharing online;
Follow an (online) course or training

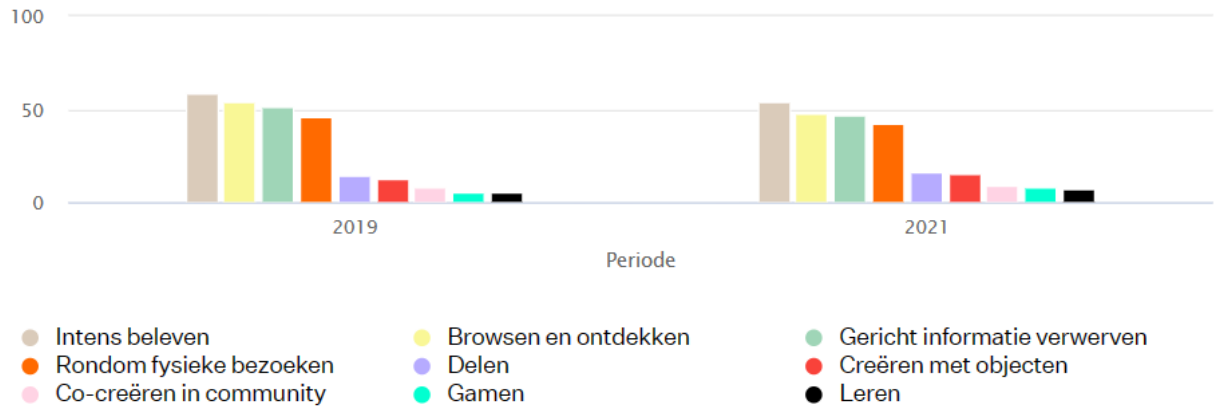


Figure 3. **Percentage of respondents engaging with heritage in various ways, 2019 and 2021**
% of respondents
[Period;
Intense experience;
Acquiring targeted information ;
Sharing;
Co-creating in community;
Learning;
Browsing and discovering;
Around physical visits;
Creating with objects;
Gaming]

Sources: Mulder et al. 2019, Kemman et al. 2021

Games

Since their first releases, video games have been inherently digital. This means that we cannot really talk about digital transformation in this domain. However, the games industry is also constantly changing due to new digital and online opportunities.

Perhaps the most significant change has been in distribution. In the past 15 years or so, physical distribution in the form of, say, cartridges or CDs,[201] has largely given way to digital distribution via online platforms (and more recently via subscription services[202] and cloud gaming).[203] This is a very significant development, as these platforms have also created space for more small, innovative, personal, and artistic games. Digital distribution, combined with the increasing availability of software and game-making expertise, has helped to expand the variety of supply. This, in turn, has contributed to the advancement of games as a cultural medium (Schrijen 2022).

Digital distribution of games

An estimated 7.4 to 7.6 million people play games in the Netherlands. In 2022, around 18 per cent of the population stated that they had bought or paid for a subscription to a game over the internet in the last three months. Within the 27 countries of the European Union, the average was 8 per cent (CBS 2022b, Eurostat 2022).

On the production side, digital distribution makes it possible to release improvements or additions to a game after it has been released. This extends the lifespan of the game, although it also means that a game is less likely to be ‘finished’: sometimes it is still being worked on years after its release.

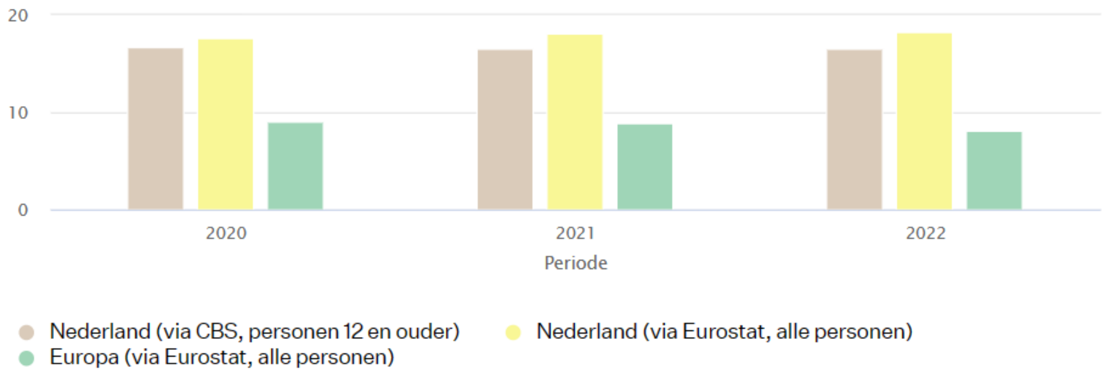


Figure 1. **Percentage of people who bought games over the internet, 2020-2022**
%
[Netherlands (according to CBS, people 12 and older);
Netherlands (according to Eurostat, all people)
Europe (according to Eurostat, all people)]

Sources: CBS 2022b, Eurostat 2022

[201] In 2022, 94.2 per cent of the total revenue of the global game industry came from digital distribution (Batchelor 2022).

[202] With subscription services, a player usually pays a fixed amount per month to download unlimited games from a catalogue. One consequence of the rise of these services is that several very large acquisitions in the game industry took place in 2022, partly in the hope of acquiring exclusive games for subscription services.

[203] With cloud gaming, a game runs on a server in a data centre, and the images are streamed to the player’s device. The advantage for players is that they do not need a powerful (game) computer, but only a stable internet connection.

For consumers, the 'online transformation' has extended the gaming experience by allowing it to be shared with others. Many people play games online, with or against friends or strangers. Online gaming has also made e-sports possible: tournaments in which professional gamers often compete against each other in a competitive context.

Proportion of people playing online

It is difficult to determine exactly how many people in the Netherlands play online games. Moreover, online gaming can have two meanings. It can mean that someone plays a game that takes place entirely online, or that someone plays a game online with others. A survey by the Mulier Institute (n=2,426) showed that 48 per cent of respondents aged 16 and older had played a game online in 2019. Of these, 60 per cent played against others (Dool 2019). An annual survey by the LISS panel shows that more than 30 per cent of the population aged 16 and older play online games.

Social media and the rise of streaming have also made it easier to share gaming experiences with others. There is also a large audience for this: more and more people[204] are watching others play games or watching e-sports competitions.

In terms of archiving, digitization offers the opportunity to preserve old games – which are often stored on physical media with a limited lifespan – for future generations and to keep them playable. At the same time, this digital transformation has given modern games features that make them difficult to archive, such as the fact that they can change constantly with updates, sometimes only work when connected to certain online services, or are only available in digital stores where they can disappear from one day to the next.

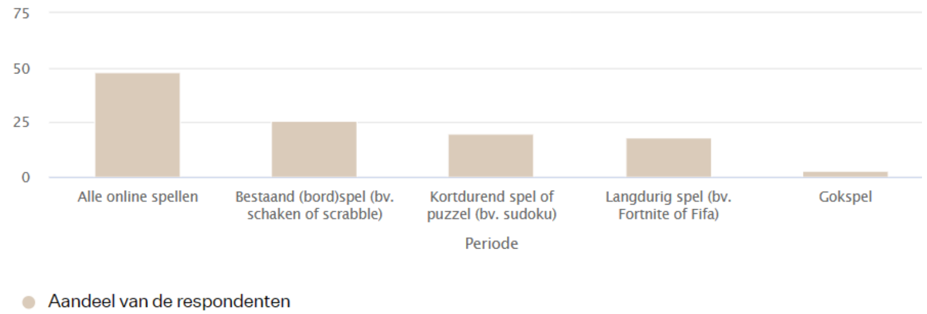


Figure 1. **Percentage of population (16+) playing online games (Mulier Institute), 2019**
% of respondents
[All online games; Existing (board) game (e.g. chess, scrabble); Short game or puzzle (e.g. sudoku); Long game (e.g. Fortnite or Fifa); Gambling game]
Sources: Dool 2019, LISS panel

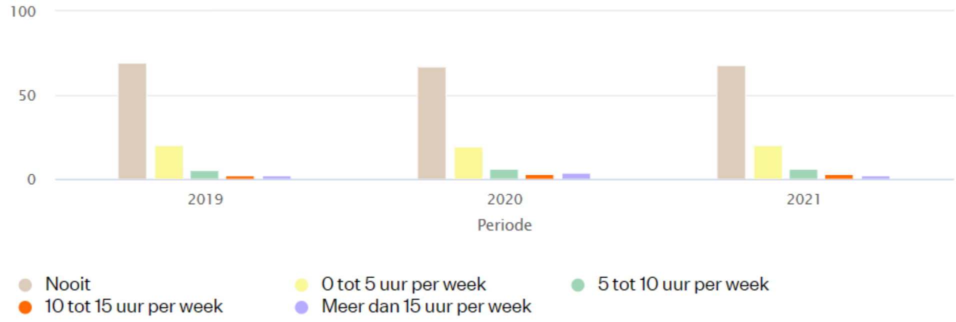


Figure 2. **Percentage of population (16+) playing online games (LISS), 2019-2020**
% of respondents
[Never; 0-5 hours per week; 5-10 hours per week; 10-15 hours per week; More than 15 hours per week] Sources: Dool 2019, LISS panel

[204] Worldwide, 549 million people watch e-sports (Newzoo 2022). Figures differ on how many people do this in the Netherlands. In 2018, research agency Superdata counted on around 1.8 million unique viewers of e-sports in the Netherlands (RTL Nieuws 2018). In a survey by the Mulier Institute in 2019, 4 per cent of the respondents (which would amount to 660,000 Dutch people) indicated that they watched e-sports. However, this does not include young people under the age of 16 (Dool 2019).

Archiving games

The Dutch Institute for Sound and Vision collects Dutch games in close cooperation with the rights holders and using the Dutch Games Canon as a guideline. In November 2022, the Sound and Vision collection contained 170 Dutch games (see figure 1).

Although the above developments concern the games industry itself, it is worth noting that games also play an important role in the digital transformation of other domains. For example, the virtual worlds of games are already being used for concerts, as backdrops for film productions, in reading promotion or as virtual museums.

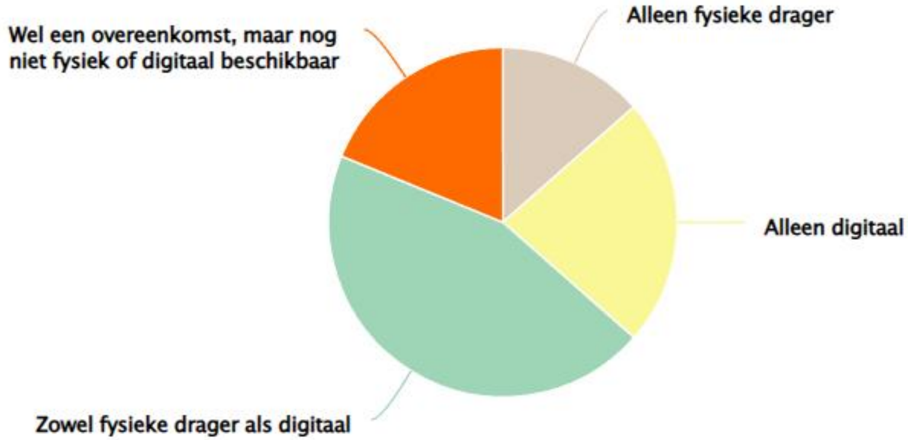


Figure 1. **Number of Dutch games in Sound and Vision collection, November 2022**
[Physical media only: 23; Digital only: 39; Both physical and digital media: 76; Agreed, but not yet physically or digitally available: 32]
Source: correspondence with Sound and Vision (Beeld en Geluid)

Literature

In literature, digital transformation can be seen in several areas,[205] including the distribution and use of e-books, online sales though physical and offline bookstores, and digital innovation in the creation of literary products themselves. However, many questions remain. For example, what does a reader expect from a digital (publishing) platform, what can a digital medium mean for the reading experience, and what literature does the consumer want or not want to buy or consume digitally?

A first development can be found in the use of digital media such as e-readers and tablets.[206] Partly as a result of the pandemic, the proportion of Dutch people who regularly read an e-book rose from 38 per cent in 2020 to 43 per cent in 2021. The majority of readers combine digital reading with reading printed books – only 6 per cent read exclusively digitally (Stichting Lezen 2021). The e-book is therefore not a direct competitor to the printed book. E-books are read relatively more often by people over the age of 50, while audio books are listened to relatively more often by the 25-49 age group (KVB Boekwerk 2021, Nagelhout et al. 2021). The choice between an e-book and a printed book may also depend on the purpose of reading: research shows, for example, that an e-book is (slightly) less suitable for reading for understanding (non-fiction) than for reading for pleasure (fiction) (Stichting Lezen 2022).

Looking at library borrowing patterns, e-books are mainly borrowed by members aged between 40 and 70. More fiction (88 per cent for e-books, 68 per cent for audio books) is borrowed than non-fiction. This is also reflected in the library's collection: 73 per cent of e-books and 66 per cent of audio books are fiction. The number of digital loans, as well as the number of digital-only subscriptions,[207] has increased steadily in recent years, with an acceleration in 2020. The number of e-books borrowed rose[208] from 3.9 million in 2019 to 5.6 million in 2020, although this was slightly down again to 5.4 million in 2021. Similarly, the number of audio books borrowed rose from 1.8 million in 2019 to 2.6 million in 2020, after which it decreased to 1.9 million in 2021 (Bibliotheekinzicht 2022).

[205] In addition to these examples, there are interesting developments in the field of digitization of printed heritage, making (old) texts available to readers online. For some of the National Library's digitization projects, see for example https://www.metamorfoze.nl/english.

[206] This text pays slightly less attention to audio books, partly because, unfortunately, fewer figures are available on this.

[207] A subscription where the library user only uses the digital services and borrows digitally. The number of active digital-only memberships increased from around 2,500 accounts in 2016 to almost 18,000 accounts in 2021. The proportion of active accounts is significantly higher for digital-only memberships, with eight out of ten accounts being actively used in 2020 (Bibliotheeknetwerk 2021).

[208] There was a big increase in loans by young people, which more than doubled to 78,400. However, the majority of all loans (86 per cent) were books for adults (Bibliotheeknetwerk 2021).

Supply and use of the national digital library

The graphs on the next page show the number of available e-books and audio books in the national digital library, as well as the number of loans (Bibliotheekinzicht 2022b).

Shifting the focus from the library to the bookshop, the first thing to note is that the book market has grown in recent years. Readers bought more than 43 million books in 2021 and sales grew by 5 per cent, the highest increase in a decade. However, physical bookstores and online sales channels have developed differently.
For the online sales channel, both sales and revenue grew by 20 per cent in 2021, making it the second consecutive year of high growth – a consequence of the developments around the pandemic. For the physical sales channel, sales fell by 7 per cent and turnover by 5 per cent in 2021, making it the second consecutive year of major decline. Compared to 2019, physical bookstore sales in 2021 were down 16 per cent, and revenue was down by 15 per cent.

As a result, since 2020 the online channel has accounted for the majority of total sales, and for more than half of total sales since 2021 (KVB Boekwerk 2022a). In 2022, physical bookstores seemed to have fared a little better than e-commerce: sales in physical stores rose by 25 per cent, while online sales fell by 11 per cent (KVB Boekwerk 2023). However, what readers buy in bookshops differs from what they buy online. Relatively more non-fiction is sold online (textbooks or books about management, both rarely available in physical stores), while in physical bookshops people are buying mainly fiction and children's books (KVB Boekwerk 2022b).

Figure 1. **Number of licenses for e-books and audio books offered by the national digital library, 2015-2021**
[Period; E-books; Audio books]
Source: Bibliotheekinzicht 2022b

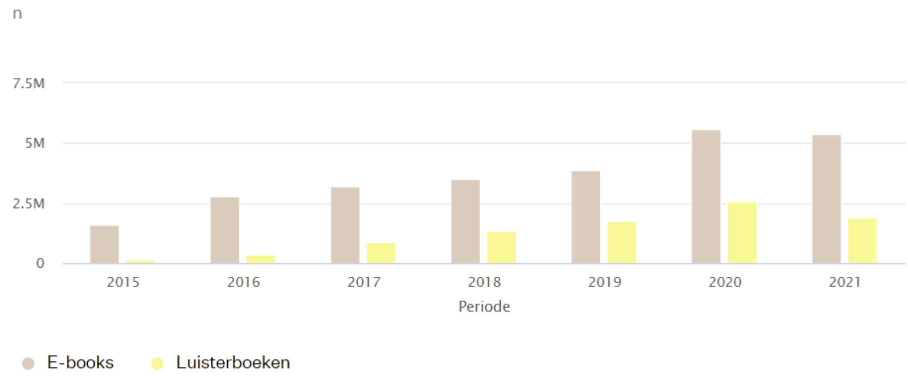
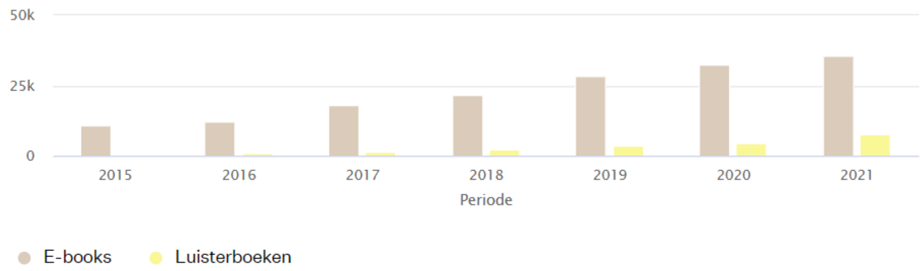


Figure 2. **Number e-books and audio books borrowed from the national digital library, 2015-2021**
[Period; E-books; Audio books]
Source: Bibliotheekinzicht 2022b



The sales and turnover of (Dutch-language) e-books also increased in 2020, before stagnating in 2021. Nevertheless, e-books account for only around 5 per cent of the total book sales (KVB Boekwerk 2022a). Within e-book sales, the share of e-book subscriptions increased from 23 per cent in 2020 to 27 per cent in 2021 (KVB Boekwerk 2022c).

Physical bookshops and e-commerce

The following graphs provide an insight into the (evolving) shares of physical bookshops and the e-commerce channel in total book turnover and sales (KVB Boekwerk 2022a).

During and after the pandemic, organizations such as the writers' booking agency De Schrijverscentrale realized how enriching the online environment could be. A number of online initiatives were launched to promote reading culture, such as Schrijver op je scherm[209] [Writer on your screen], which started in 2020. Literary festivals offered more online programmes, and still do to some extent. There are also a number of new players on the market who are redefining digital reading: for example, the popular Wattpad, a platform that attracts readers mostly aged 12 to 26 who mainly discuss fiction in the chat. BookTok, a trend[210] on the popular TikTok platform with numerous book tips, draws attention for literature from a young readership often assumed to read very little or not at all.

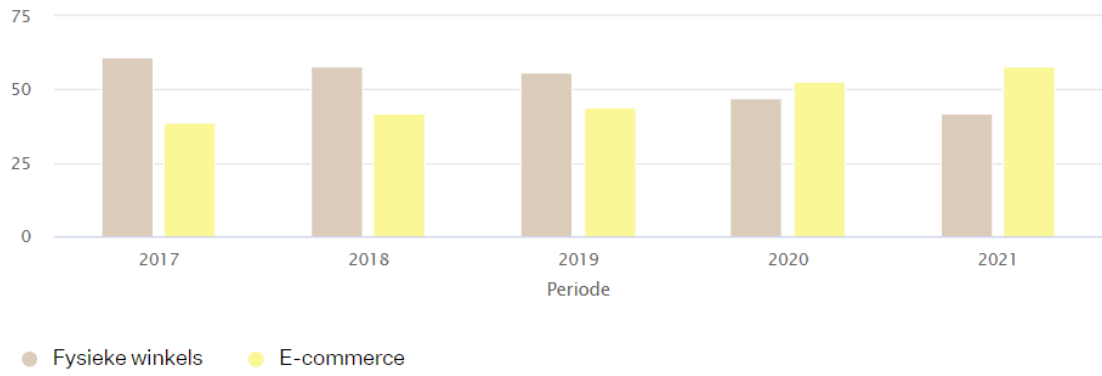


Figure 1. **Share of physical bookstores and the e-commerce channel in book market turnover, 2017-2021**
Physical stores; E-commerce] Source: KVB Boekwerk 2022b

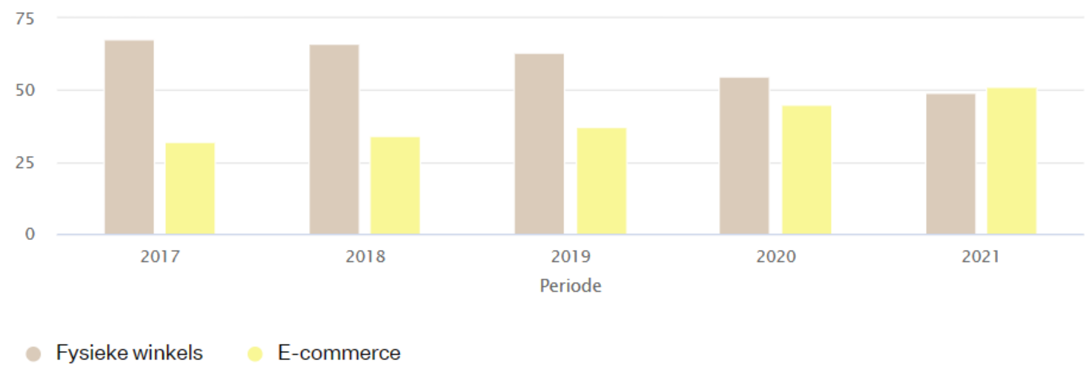


Figure 2. **Percentage of physical bookshops and online retailers in book sales, 2017-2021**
[Period; Physical stores; E-commerce] Source: KVB Boekwerk 2022b

[209] See https://deschrijverscentrale.nl/campagnejaren/1987973
[210] See the Literature domain section of the Culture Monitor.

Other platforms for digital reading and/or experiences include the audio book platform Fluister (Storytel's competitor), the Immer[211] app which enriches and facilitates reading on tablets, and the online magazine of De Gids called DIG (De Internet Gids), which, since 2010, has been conducting all kinds of online experiments with multimedia and literature. One example is interactive fiction,[212] which has been around since the advent of the internet, but has yet to really take off. The form consists of literary texts that are experienced through an interactive form on a web browser or other program. Another digital genre[213] is 'Instagram poetry', which shows how poetry too can flourish in the digital environment:[214] the poet Rupi Kaur, for example, has more than 4.5 million followers on Instagram.

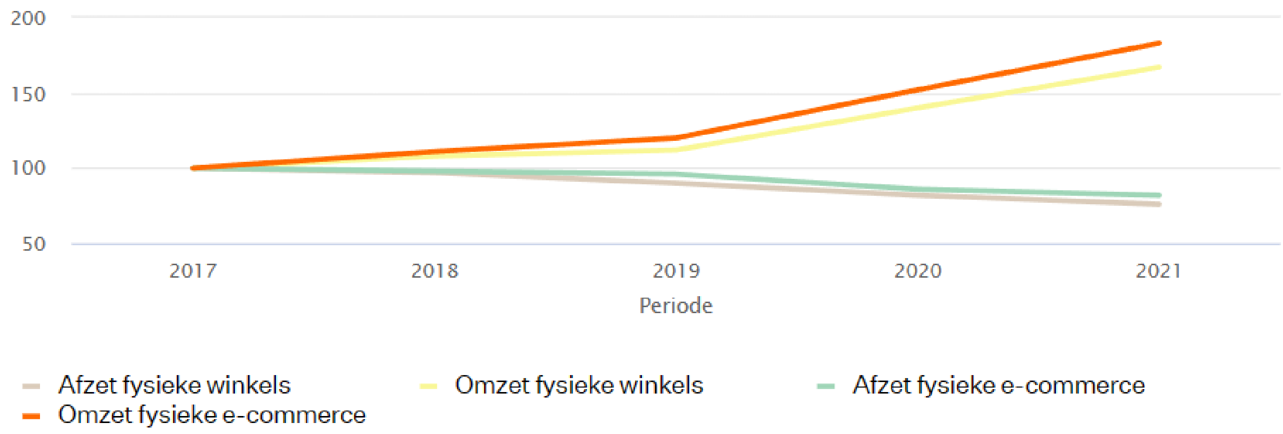


Figure 3. **Sales and turnover development of physical bookshops and online retailers, 2017-2021**
Indices 2017 = 100
[Physical bookshop sales; Online sales; Physical bookshop turnover; Online turnover] Source: KVB Boekwerk 2022b

[211] A platform that has won awards both in the Netherlands and at the Frankfurt Book Fair.
[212] A key element of interactive fiction is hypertext, achieved by, in short, hyperlinking. An example of a tool for developing interactive fiction is Twine, which makes (experimenting with) a programming language such as JavaScript very accessible.
[213] Literary organizations are also paying attention to online literature. The Dutch Foundation for Literature, for example, organized 'Literatuur op scherm' ['Literature on the screen'] on 18 February 2022, where creators and researchers took a closer look at digital literature. Perdu, the poetry centre in Amsterdam, organised the evening 'Een gedicht is een network: Wat is er poëtisch aan het internet?' ['A poem is a network: What is poetic about the internet'] in December 2022.
[214] Experiments such as a novel written on Twitter in tweets of up to 120 characters are also interesting. One such novel was written by Nicholas Belardes in 2008 and consisted of 900 tweets.

Performing arts

In the performing arts, the physical, live experience is perhaps even more important than in other field. The energy of the venue, the interaction with the artist, the music that you feel as well as hear… This does not alter the fact that the digital experience is increasingly complementing and enriching[215] the physical experience in the performing arts.

This is particularly the case with live performances. For example, digital technologies offer new possibilities[216] in terms of images, lighting, sound, and special effects (SBB 2020). But digital transformation also offers opportunities for productions, such as providing additional information via an app during a performance, or for relevant fringe programming or educational programmes. The digitization of ticketing systems also presents many opportunities and insights in the area of audience data. For example, DIP creates a link between ticketing systems, allowing aggregated and anonymized audience and sales data[217] to be analyzed at scale (DIP nd).
Digital transformation also offers additional ways to reach audiences. This is nothing new in the music industry: since 2015, the majority of recorded-music revenues have come from digital distribution, mainly through streaming platforms such as Apple Music and Spotify (NVPI 2022). This shift has also allowed artists to do more themselves[218] and to interact more directly with their audiences.

Music streaming

The graphs on the next page provide an insight into music streaming. The first graph shows the share of physical and digital distribution in the turnover of the Dutch music industry (NVPI 2022). The second graph shows the share of the Dutch population that buys digital music or pays for a music streaming service (CBS 2022b, Eurostat 2022).

Although live performances and events were sometimes offered digitally as streams or video recordings, it was only as a result of the coronavirus regulations in 2020 and 2021 that this digital offering really increased. A large proportion of venues, artists and companies offered live streams, archive footage or other online content during the pandemic years and were able to reach large audiences. For example, the 77 companies that received a multi-year grant from the Performing Arts Fund NL in 2020 and are members of the industry association NAPK programmed almost 300 online performances in both years, which were viewed by more than 1.3 million people (Draaijers 2022). Although the focus was more on physical performances from 2022 onwards, some companies continue to offer online performances.

During the pandemic, the digital domain also offered opportunities for amateur artists. The vast majority of practitioners who attended classes, courses or workshops in any of the

[215] See also Fonds Podiumkunsten 2018.
[216] For example, a show can become a virtual pre-production that can be digitally optimized, or digitally controlled equipment can allow light and sound to communicate with each other. Or consider the use of holograms, such as the ABBA holograms that first appeared in London in 2022.
[217] In addition, a culture-wide effort to standardize and share audience data is taking place within the Taskforce Samenwerkingsverband Publieksdata [Audience Data Collaboration Task Force]. The task force focuses on cultural participation and is made up of seven cultural institutions, led by the DEN Knowledge Institute for Culture & Digital Transformation.
[218] Although the pressure to do so also leads to burnout for some artists – see for example Jones 2022 and MFF 2022.

performing arts domains did so at least partly online. A (smaller) proportion of practitioners also found a place to perform online (Neele et al. 2022).

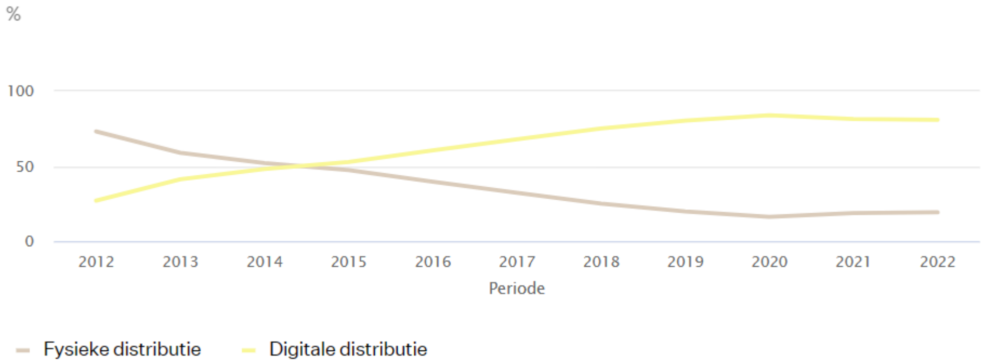


Figure 1. **Share of physical and digital distribution in the turnover of the music industry in the Netherlands, 2012 – 2021**
[Period; Physical distribution; Digital distribution]
Sources: NVPI 2022, CBS 2022b, Eurostat 2022

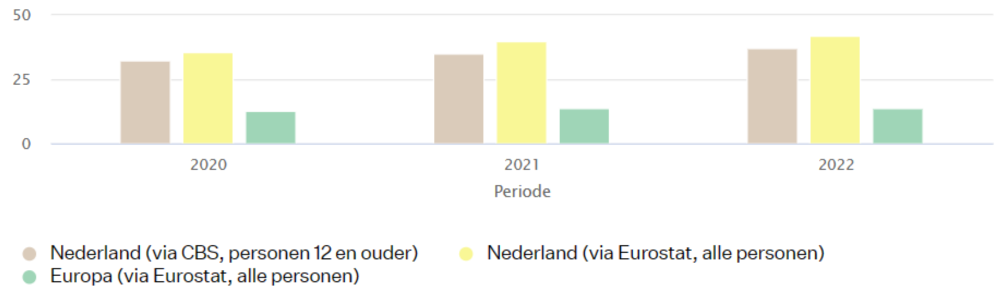


Figure 2. **Percentage of people who have bought or paid for music via streaming or download, 2020-2022**
% respondents
[Period;
Netherlands (via CBS, persons aged 12 and above); Netherlands (via Eurostat, all persons);
Europe (via Eurostat, all persons)]
Sources: NVPI 2022, CBS 2022b, Eurostat 2022

(Use of) online performing arts offerings

The first figure in the graph below shows how many online performances were programmed by the 77 companies that received a multi-year grant from the Performing Arts Fund NL in 2020 and are members of the NAPK, and how many people viewed them in total (Draaijers 2022). The second graph shows the use of online cultural education in 2021 (Neele et al. 2021).

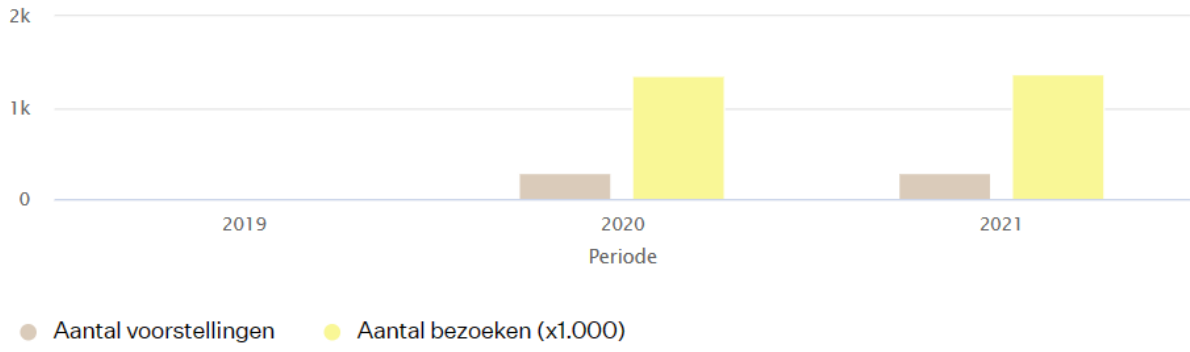


Figure 1. **(Visits to) online performances by 77 performing arts companies with a multi-year subsidy from the Performing Arts Fund NL, 2019-2020**
Number of performances: n / Number of visitors: n x 1,000
[Period; Number of performances; Number of visitors: (x 1,000)]
Source: Draaijers 2022

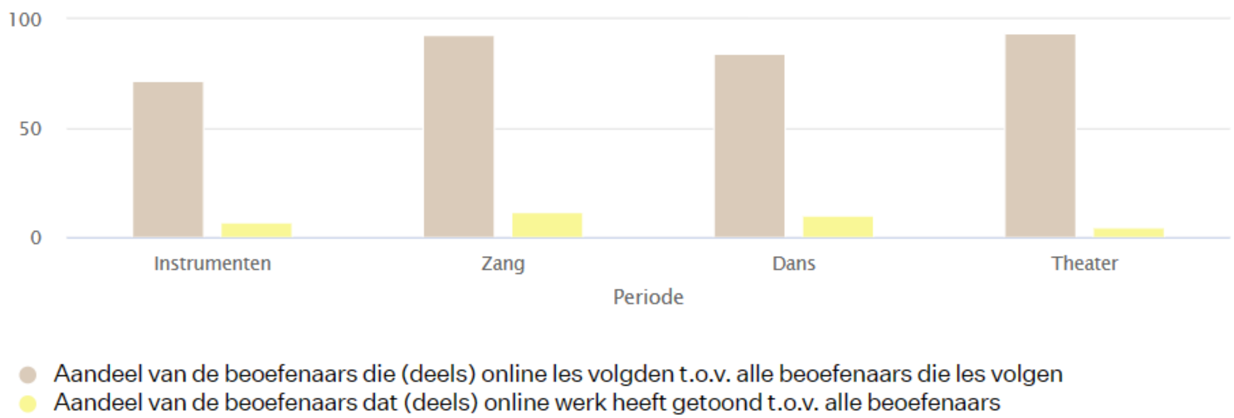


Figure 2. **Extent to which creative professionals have followed courses or shown work online, 2021**
% of respondents
[Instruments; Singing; Dance; Theatre;
Period;
Percentage of practitioners who took lessons (partly) online vs. all practitioners;
Percentage of practitioners who showed work (partly) online vs. all practitioners]
Source: Neele et al. 2021

Major steps are also being taken to digitize performing arts archives. Podiumkunst.net is currently working to connect different performing arts collections[219] so that they can all be searched from a central service platform. In addition, Podiumkunst.net is working in a number of ways to promote expertise and stimulate creative re-use of digitized material to help the performing arts sector with its digital transformation. The main bottlenecks faced by organizations are lack of time (61.0% of respondents), priority (51.2%), and resources (29.3%) (Podiumkunst.net 2022).

State of digitization of performing arts archives

The graphs on this and the following page show some of the results of a small study on the digitization of performing arts archives among 49 organizations (Podiumkunst.net 2022). For an older study, see also Faun et al. 2016.

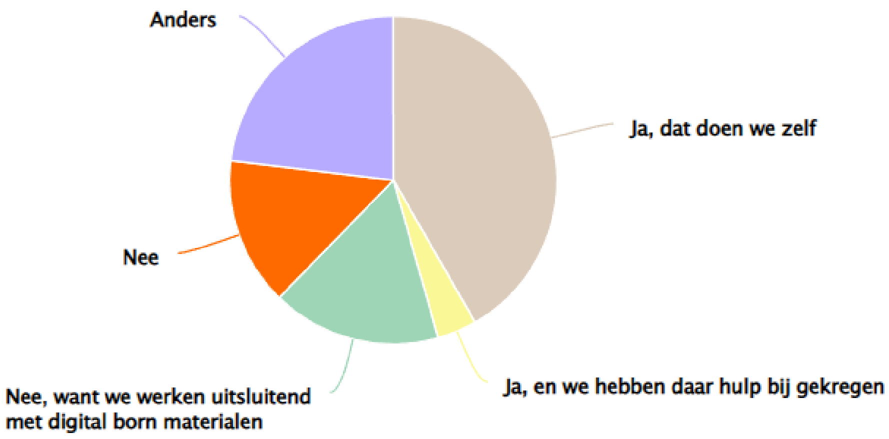


Figure 1. **Answers to the question of whether respondents are digitizing their archive, 2022**
% of respondents
[Yes, we are doing it ourselves: 41.7;
Yes, and we received help to do so: 3.9;
No, because we work exclusively with born-digital materials: 16.7;
No: 14.6;
Other: 23.1]
Source: Podiumkunst.net 2022

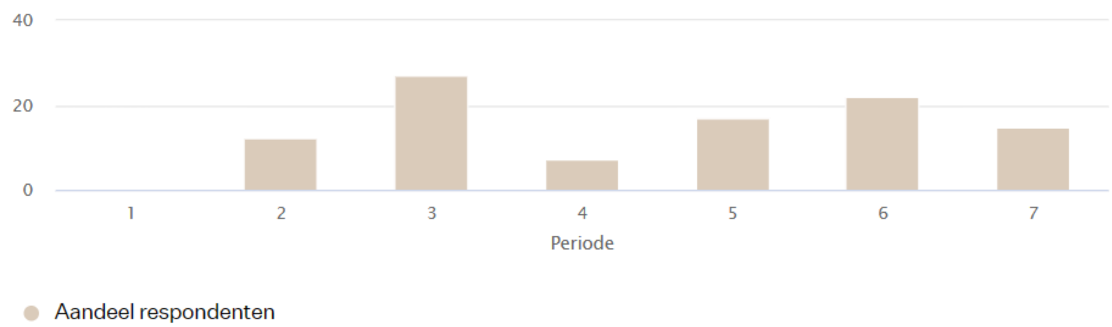


Figure 2. **Extent to which respondents' archives are digitized on a scale of 1 ('a little') to 7 ('a lot')**
% of respondents
Source: Podiumkunst.net 2022

[219] See also https://www.podiumkunst.net/schatkamer/ for an overview of different archives.

3. CONCLUSION

The inventory on this page shows that digital technologies are being used in very different ways in the cultural and creative sector. However, there is a clear similarity in the great opportunities that this engagement offers: to create things that were not possible before, to reach new audiences and to stay connected to the audiences of the future, and to ensure that the art of the past and the present is available in that future. At the same time, there are similar barriers to sustainable digital transformation in many areas: in particular, a lack of investment capacity and knowledge. As a result, there are also concerns about the ability of larger organizations in particular to focus on digital transformation and reap the benefits.
An important conclusion of this first stocktaking is that data seems to be available mainly on the use of digital technologies in production, distribution, end-use and archiving. However, it is much less clear how organizations are actually and fundamentally changing as a result, in areas such as culture, strategy, processes, relationships and people skills. One of the ambitions of the development of this site is therefore to explore how this necessary knowledge can be strengthened, including in collaboration with DEN.

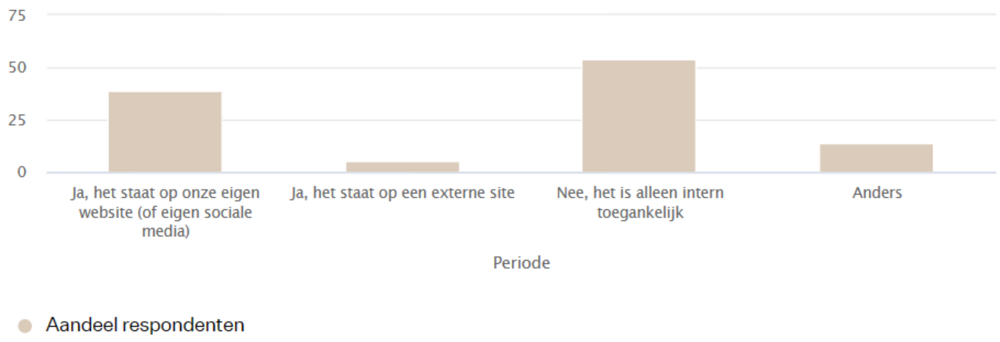


Figure 3. **Answers to the question of whether the archive is (partly) accessible to the public, 2022**
% of respondents
[Yes, it's on our website (or social media); Yes, it's on an external site; No, it's only accessible internally; Other]
Source: Podiumkunst.net 2022

A second ambition is to further explore the interfaces with the other themes of the Culture Monitor in the future. What does digital transformation mean for digital and physical cultural participation? And for the professional practice of makers? To what extent does digitization contribute to a more equal cultural sector? Does digital transformation make the sector more or less environmentally sustainable?

In addition, in future updates of this page, we hope to pay more attention to important technological developments that could have a major impact on the sector. For example, artificial intelligence (AI) is currently receiving a lot of attention, partly due to the release of the ChatGPT program at the end of 2022 (Schellevis 2022). Although it is by no means perfect, AI can already generate text, images and music at a fairly usable level. It is clear that this offers great opportunities – but will also raise many big questions in the future. We hope to provide space for that on this page in the future.

4. WANT TO KNOW MORE ABOUT DIGITAL TRANSFORMATION?

A lot of information about digital transformation in the cultural sector, and how you as a cultural professional or cultural organization can take steps in the process of digital transformation, is available through DEN, Knowledge Institute for Culture & Digital Transformation. In addition, approximately 2,300 publications related to digitization in the cultural sector are available via the Boekman Foundation's Knowledge Bank.

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THEME: DIVERSITY, EQUITY AND INCLUSION

Diversity, equity and inclusion together form one of the core themes of the Culture Monitor. In order to do justice to diversity and achieve equity and inclusion, the cultural sector needs to also pay attention to the deep-rooted issues that perpetuate injustice, such as racism, discrimination, transgressive behaviour and unequal opportunities. On this page we explore the existing research on diversity, equity and inclusion in the Netherlands.

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Unseen Amsterdam / Photography: Lisa Maatjens

DIVERSITY, EQUITY AND INCLUSION

SUMMARY

Monitoring diversity, equity and inclusion is a complex issue. Quantitative data – which is essential to monitor in order to make sound policies in this area – is often lacking. The how and why of monitoring diversity is discussed, as well as the importance of using inclusive language and choosing the right categories for research. The use and meaning of the terms ‘diversity and inclusion’ are critically examined. ‘Equity’ is added to these terms as a condition for creating an inclusive (working) environment.

It also lists the most important issues related to diversity, equity and inclusion, and provides an up-to-date overview of the research that has already been done on this topic in the Dutch arts and cultural sector. In this way, the Culture Monitor hopes to provide a helping hand to the sector and to anyone who wants to work on monitoring diversity, equity and inclusion within their own organization.

1. INTRODUCTION AND THE IMPORTANCE OF THE THEME

Diversity, equity and inclusion are issues of increasingly urgency. From international movements such as Black Lives Matter and #MeToo, to events in the Netherlands around The Voice of Holland and transgressive behaviour in the cultural and creative sector, to institutional racism in the police and the tax authorities: there are countless examples that clearly show the need for change, because not everyone is heard or supported equally in society. Inequity must be tackled and there must be more space for diversity.

Given the urgency of diversity, equity and inclusion, it is important to monitor the state of affairs regarding these themes, but this is not easy. The Netherlands is working in various ways to collect data on diversity and inclusion in the cultural sector, but there is still a lack of sector-wide, serial, national and regional figures – the very figures[220] that are crucial for visualizing long-term trends. In recent years, however, an increasing number of studies on diversity and inclusion in the cultural sector have been published, often focusing on a specific sub-sector or case.

On this page, the Culture Monitor explores[221] research on diversity, equity and inclusion in the Netherlands. In this analysis, we consider the definition of diversity, inclusion and equity, identify a number of sector-wide issues, discuss the complexity of measuring diversity and inclusion, and explore research questions for the future. An up-to-date overview of all the studies on diversity, equity and inclusion that have been carried out in the Dutch cultural sector is also provided.

2. THE COMPLEXITY OF MEASURING DIVERSITY AND INCLUSION

The theme of ‘diversity and inclusion’ focuses on the pursuit of representation, accessibility and equity in the cultural sector. The Code Diversiteit & Inclusie [Diversity & Inclusion Code] encourages cultural organizations to give substance to the theme. The code is

[220] In the Netherlands, for instance, nationwide figures are kept on the socio-economic position of Dutch people born abroad (CBS 2022) or research is done on income inequity by migration background (Centraal Planbureau 2019). However, these figures do not give a company or sector a handle to change anything about their policies. In the UK, for example, monitoring is more active, allowing specific policies to be developed and outcomes monitored (Rana et al. 2022, Gillham 2021).

[221] For this exploration, a focus group discussion was conducted with several experts from the sector in the field of diversity and inclusion in different areas of the sector, complemented by desk research. See ‘9. Discussion partners' for the names of the participants.

supported by the Ministry of Education, Culture and Science (OCW), which makes compliance with the code a condition for subsidies. As a result, all subsidized cultural institutions now include diversity and inclusion in their policy plan. As a result, 'diversity and inclusion' as an issue emerges from the subsidy system of the cultural sector, and is, in this sense, a political issue.

In addition to the concepts of diversity and inclusion, we increasingly see the concept of 'equity' (*gelijkwaardigheid* in Dutch), rather than 'equality' *(gelijkheid)*. In English, the term DEI (diversity, equity & inclusion)[222] is often used. The term diversity is used to indicate that people actually differ from each other in a number of visible and invisible characteristics – for example, (cultural) background, disability(s), health status, gender, sexuality, religion, socio-economic position, level of education, political preference and age. Equity is about equal treatment tailored to all these different personal characteristics – equity does not mean that everyone gets the same and equal opportunities (equality, in other words). Think, for example, of the pay gap between men and women,[223] or equal opportunities in the labour market,[224] regardless of background. Equity, which refers to the way in which these real differences and similarities between people are dealt with, is therefore a prerequisite for inclusion. In an inclusive environment, accessibility (both physical, content and digital) is guaranteed for everyone and all people feel welcome, safe and respected.

'Diversity and inclusion' is now also regularly described as hype or 'happy talk'.[225] This has to do with the fact that, while organizations are working on the issue with the best intentions, too little structural change is happening in these organizations and in the sector as a whole – despite the fact that the issue has been on the policy agenda for decades. There is a lot of talk about diversity and inclusion, but organizations still often struggle to put their good intentions into practice – as shown by the *Onderzoek Theater Inclusief* [Inclusive Theatre Research] (Haeren et al. 2022) and discussions held with the sector for this theme page. The terms diversity and inclusion are broad and all-encompassing, which means (so the criticism[226] goes) that the conversation in the cultural and creative sector is not focussed on what we should really be discussing: discrimination, racism and institutional racism, unconscious bias, transgressive behaviour, iniquity of opportunity, microaggressions, homophobia, Islamophobia, whiteness, sexism, colonial knowledge structures and other forms of exclusion and inequity. Language – the words we use to name these issues and not shy away from discomfort – is essential if the cultural sector is to tackle structural inequity (see, for example, Noor 2022 and Nourhussen 2022).

[222] Equity is cited in the Netherlands (more generally than merely in the cultural sector) from the English term DEI. In the cultural sector, for example, the term came up several times at the national consultation meeting on inclusion (a closed consultation organised by LKCA – author of the Diversity & Inclusion Code – in which about 30 delegates from cultural funds, sector associations, municipalities and cultural institutions take part). However, the term is not (yet) adopted by the Diversity & Inclusion Code. Broad support for policy-making on equity specifically besides diversity and inclusion is still lacking in the Dutch cultural sector.

[223] See also CBS's Monitor Loonverschillen [Wage Gap Monitor], which shows that the gender pay gap has been narrowing ever so slightly in recent years in small increments.

[224] To illustrate, actress Maryam Hassouni released the book *Wat de fak* [*What the Fak]* in October 2022 about the lack of this in the Dutch film industry.

[225] This came up in a focus discussion with industry experts conducted for this theme page, but see also, for example, Nourhussen 2022 who refers to diversity and inclusion as 'vague talk'. International discourse, particularly in the USA, has long been critical of 'happy talk' regarding diversity and inclusion (see, for example, Bell et al. 2007).

[226] This was confirmed in the focus group discussion for this theme page, which was held with experts from the cultural sector.

(Western) colonialism has left traces in our thinking about knowledge, art, literature, philosophy, science and ideology (Coppen 2021). Colonial knowledge structures, with a Eurocentric view, are still present in the Netherlands, as are thinking and acting from a 'superior' position by leading (knowledge) institutions, determining what the value of knowledge is and where different forms of knowledge can be found. To change this, there is a growing call for the 'decolonization' of the cultural sector. Decolonization is not only about letting go of the colonial project, but also about how people today still struggle with the ideology of colonialism (Debeuckelaere 2019). As a knowledge centre for art, culture and policy, the Boekman Foundation strives to critically examine the process of gathering information on art and cultural policy, including tracking certain indicators in the Culture Monitor.

3. WHAT ARE THE LATEST SECTOR-WIDE ISSUES?

In recent years, the increased demand for data on diversity, equity and inclusion has led to the publication of a growing number of studies on topics that fall under the theme. A number of these issues are recurring and can therefore be considered as the main current issues in the field.

Gender inequality

Research on gender inequity, reinforcement or discrimination is ongoing in various sectors. In 2022, for example, research was conducted in the theatre sector on gender differences in the VSCD Toneelprijs [Theatre Award] (Hoilu Fradique et al. 2022); while in the visual arts sector, an exploratory study was conducted on gender (in)equity in the art world (Women Inc. 2022); and in the film and television sector, the position of women in the period 2011-2020 was mapped out (Sanders 2020). Quantitative data on diversity or representation is still often lacking, but when it comes to gender (which is often only based on the binary categories of man and woman), there is relatively more data available. For example, Statistics Netherlands (CBS) keeps data on the weekly hours worked by men and women in creative and linguistic professions.

Transgressive behaviour and social safety

Since the emergence of #MeToo[227] in 2017, international solidarity with the movement against transgressive behaviour has increased significantly. In the Dutch cultural sector, too, there are numerous examples of cases of transgressive behaviour that have come to light in recent years (Leden 2021a, Leden 2022). The need for a place to report such undesirable behaviour in the cultural and creative sector was great. Therefore, on the initiative of more than 30 parties from the cultural sector Mores.online was established in June 2018 as a collective hotline for the Dutch cultural and creative sector (Beeckmans 2019).

In June 2022, the Council for Culture published its advisory document *Over de grens [Over the border]*, in which it made a number of observations and recommendations. For example, the council noted that transgressive behaviour does not only mean sexual harassment, but also includes other forms of undesirable behaviour such as bullying, intimidation, racism and discrimination based on skin colour, religion, gender or other personal characteristics. In

[227] In 2006, civil rights activist Tarana Burke began using the phrase 'me too' to draw attention to sexual violence in society. In 2017, actress Alyssa Milano encouraged women to use #MeToo on Twitter to share their experiences of sexually transgressive behavior, after film producer Harvey Weinstein was accused of sexual abuse by several women.

addition, the cultural sector often has gatekeepers (for example curators, art school teachers or artistic directors) who provide access to the field, which can lead to power relations and unsafe situations. The council also sees a lack of inclusion within the sector, a culture of silence when it comes to transgressive behaviour, risks in vocational arts education and a lack of structures aimed at social safety (Raad voor Cultuur 2022a).

Social safety is about making shared norms explicit, so that undesirable behaviour can be recognized or prevented, and so that a safe (working) environment can thus be created and maintained. Social safety is therefore a prerequisite for the prevention of transgressive behaviour. This has been researched, for example, in the cultural sector in Rotterdam.[228]

Accessibility

Cultural institutions should be accessible to everyone, regardless of abilities or limitations (Bilo 2020, 7). Too often, however, this is not the case. People with a physical disability may face obstacles such as stairs, thresholds and doors in buildings, or there may be a lack of support for people with visual and hearing impairments (Leden 2021b). The provision of a low-stimulus environment, for example, is also still rare (Haeren et al. 2022, 48). In her *Meerjarenbrief 2023-2025*, outlining cultural policy for the coming years, State Secretary Uslu mentions measures such as additional investments in accessibility to remove both visible and invisible barriers (Uslu 2022). Studies on accessibility in the cultural sector include a survey of the accessibility of cultural institutions for people with a disability (Bilo 2020), *Lang niet toegangkelijk* [Long inaccessible] (Vermeij et al. 2021), and a report on access to art and culture for people with a disability (Leden 2021b).

Representation

In the cultural sector, an increasing number of institutions are seeking to gain an insight into the 'level of diversity' or representation in their organization, whether among their staff members or their audiences. Research on representation is therefore usually tailor-made and carried out at an organizational or sectoral level. See, for example, the study by Statistics Netherlands (CBS) on cultural diversity in the Rijksmuseum,[229] or in bookshops in the report *Rapportage boekenbranche meting 57: themameeting diversiteit* (Nagelhout et al. 2021). At a sector-wide level, Statistics Netherlands maintains a survey of artists and other creative professionals, the *Monitor Kunstenaars en andere werkenden met een creatief beroep*, which includes 'diversity' figures on the age, gender, migration background and household position of artists and creative professionals (CBS 2021). We will return to the monitoring of diversity or representation in more detail in section 4 of this analysis.

Decolonization

The decolonization and dismantling of power structures that perpetuate white privilege is an important topic of research and discussion in the cultural sector (as described in section 2 above). For example, in 2020 the Council for Culture published the advisory report on colonial collections, and several museums

[228] See the research report on social safety in the Rotterdam arts and culture sector (Klarenbeek 2022).

[229] Statistics Netherlands (CBS) conducted research on this in 2021 in Culturele diversiteit Rijksmusem [Cultural Diversity Rijksmuseum] 2019, and in 2022 and in Culturele diversiteit Rijksmusem [Cultural Diversity Rijksmuseum] 2020 and 2021.

have since announced that they will be researching their own collections.[230]

However, decolonization is not only about the return of artefacts taken from the country of origin by the Dutch occupiers. It also requires recognizing and rejecting the colonial ideology on which policies and institutions have been built, and continue to operate – including in the cultural sector (Coppen 2021).

Broad cultural understanding

"Culture is by and for everyone," wrote former Minister of Culture Ingrid van Engelshoven in her cultural policy document, *Uitgangspunten Cultuurbeleid 2021-2024*. This included an expansion of the basic cultural infrastructure (BIS): new developments, missing genres (such as urban art, design, pop music and festivals) and their respective audiences should also be given a place. Broadening our understanding of culture is crucial if we want to see all forms of culture and their participants represented.

The role of cultural funds

An important part of the cultural sector depends on financial support from governments and public or private funds. The Ministry of Education, Culture and Science has made it mandatory for cultural institutions that fall under the BIS and which are supported by the six Rijkscultuurfondsen, or public cultural funds,[231] to endorse and apply the Diversity & Inclusion Code. In addition, private funds for culture such as the VSB Fund are also actively involved in diversity and inclusion. Local authorities are also increasingly emphasizing the importance of complying with the Diversity & Inclusion Code. Governments and funds therefore play a role in steering and testing diversity, equity and inclusion. There are currently no sanctions for non-compliance with the code as non-compliant organizations can continue to receive their funding. Discussions with the sector have shown that a greater focus on and testing of representation, inclusion and accessibility is an ongoing issue.

Uneven progress

Another observation, based on discussions with sector experts, is that there are differences between cultural domains in terms of progress towards diversity and inclusion, and also between the organizations within cultural domains. For example, much is already being done in the performing arts sector to ensure representation,[232] accessibility and inclusion (although there is still much to be done),[233] but the games[234] sector in particular is lagging behind. The *Inclusive Theatre Research* report also found that progress on inclusion, diversity and equity can vary widely between the 19 theatres and theatre companies participating in the Theater Inclusief [Inclusive Theatre] funding programme (Haeren et al. 2022).

Future research

In addition to the existing reports, a number of studies have been announced for the near future. For example, the Council for Culture is expected to present its policy recommendations on diversity and inclusion

[230] See, for example, the collaboration in Provenance Research: Colonial Collections between the Rijksmuseum, the National Museum of World Cultures and the Expertisecentrum Restitutie van het NIOD Instituut voor Oorlogs-, Holocaust- en Genocidestudies [Restitution Expertise Centre of the NIOD Institute for War, Holocaust and Genocide Studies] (Rijksmuseum n.d.), and the exploration Teruggave koloniale goederen: niet het einde van een proces, maar een nieuw begin. [Restitution of colonial goods: not the end of a process, but a new beginning] (Leden 2023).

[231] The six public cultural funds are the Performing Arts Fund, Creative Industries Fund NL, Mondriaan Fund, Netherlands Film Fund, Dutch Foundation for Literature and the Cultural Participation Fund.

[232] In January 2023, for instance, NOS had the headline, 'The Theatre is Increasingly Full of New Audiences' (Halouchi 2023).

[233] See further, for example, Maarten van Hinte's article 'Waar het echte gesprek begint' ['Where the real conversation starts'] in the *Theaterkrant*.

[234] See the section 'Progress in diversity, equity and inclusion' on the Games domain page in the Culture Monitor.

in June 2023. In this document, the council will reflect on steps towards a more inclusive system, including the role that (public) subsidy providers can play in their assessment and monitoring role (Raad voor Cultuur 2022b). In July 2022, the Ministry of Education, Culture and Science (OCW) announced that it would conduct research into the representation of people of colour in the Dutch film and television sector. In October 2022, the Ministry of Education, Culture and Science also presented the *OCW's agenda* for combating discrimination and racism. As part of this it announced that, in addition to research, a monitoring and evaluation strategy would be set up in the near future to track the effectiveness of the ministry's actions against discrimination and racism, so that timely adjustments could be made if necessary (Dijkgraaf 2022).

4. MONITORING DIVERSITY, EQUITY AND INCLUSION

Why and how should we measure diversity and inclusion?

The cultural and creative sector has a common need for research and data collection on diversity, equity and inclusion. This is particularly relevant within organizations, especially when trying to understand how well the workforce reflects the diversity of the local community or how effectively it reaches a diverse and wide audience. This increased need for data follows the trend of increased attention to the issue and may also be explained by the mandatory endorsement of the Diversity & Inclusion Code for funded cultural institutions. Organizations, policy makers and funders want to know where they stand in terms of diversity and inclusion so that they can adjust their policies accordingly. Research shows that there is often a need for adaptation, depending on the organization, industry or sector being investigated. It is clear that there is no sector-wide consensus on how, for example, representation (or diversity) should be handled.

As well as the question of how to measure diversity (and inclusion and equity), there is also the question of *why*: for example, for ethical reasons organizations choose not to ask or assess staff about their backgrounds – this is clear from interviews with the sector for the Culture Monitor, as well as (on a small scale) from the *Inclusive Theatre Research* project. But the answer to the question of *why* should be clear: we need to measure data on racism, discrimination, inequity, accessibility, transgressive behaviour and other issues, in order to make these problems visible, to substantiate them, to be able to formulate policy about them (in the four Ps[235] of public, personnel, programming and partners), and then to monitor progress towards improvement.

However, there is still a lack of quantitative data on issues such as social class or ethnicity in the labour market – despite their importance for the cultural sector. The lack of sector-wide, serial, national or regional figures on diversity, equity and inclusion is partly due to the complexity of measuring this in light of Dutch legislation. Two examples of this complexity are working with personal data and categorization in research (this is explained on below).

Sensitivity of personal data

Personal data is often protected by the General Data Protection Regulation (GDPR) and therefore cannot be collected just like that. For example, there are audience segmentation systems that enable institutions

[235] The Diversity & Inclusion Code uses the four Ps as practical starting points for organizations to change in terms of diversity and inclusion.

to enrich audience data with customer segments from an external agency, such as Whooz or Motivaction. However, it is important that the data is collected systematically and that it is comparable for different organizations (national or local). For this reason, the Taskforce Samenwerkingsverband Publieksdata [Audience Data Collaboration Task Force] was set up in 2021 under the leadership of the DEN Knowledge Institute for Culture & Digital Transformation. In the coming years, this task force[236] will work on standardization and towards a national system of audience segmentation aimed at culture (DEN 2022).

In particular, it can be sensitive for a cultural organization to collect personal data about its own workforce, and staff may feel uncomfortable, disadvantaged or pigeon-holed – this picture is confirmed by discussions with the sector and is evident, for example, in the *Inclusive Theatre Research*: *concluding analysis*, in which several theatre organizations indicate that they feel uncomfortable asking about people's backgrounds for ethical reasons. In this case, this discomfort wins out over the importance of collecting data to create a picture of representation and exclusion – even though this is crucial for the organizations themselves, including on the micro level, to gain insight into the status quo, progress or deterioration, and to adjust policies accordingly. In her Staat van het Theater[237] [State of the Theatre] address, Alida Dors advocated for revealing everyone's background as a matter of course in September 2022. She had previously written a blog on the subject on the Diversity & Inclusion Code website (Dors 2022).

The problem with categories and the importance of defining the problem

Monitoring diversity is complex. In addition to the sensitivity of personal data, the way we categorize people (or human differences) in research, and the words we use, also play a role (see the example of the Statistics Netherlands categories below under 'Inclusive language is critical'). It is also desirable to consider intersectional dimensions in research. In other words, there are different axes along which social inequity occurs (such as being female, being of colour, being transgender), which can overlap and lead to specific positions and discrimination of individuals.

Monitoring diversity, like any other measurement, by definition requires pigeon-holing – at the same time, it is preferable to avoid this because of unconscious bias and discrimination. To gain a better insight into the categories of research when measuring diversity in the cultural sector, Jasmijn Rana and Anouk de Koning conducted a small qualitative study[238] in 2021 (Rana et al. 2022). Of the pigeon-holing involved, they state:

"Measuring means recording, and as many interviewees said, putting things in boxes. Both people 'with a migrant background' and people 'without' felt uncomfortable with this. This is a deeply felt dilemma: you can't reduce a person to a characteristic, and for many that is what has happened. (...) Such categorization remains a form of symbolic violence: constantly being

[236] The Audience Data Collaboration Task Force consists of the cultural organisations Cineville, CJP, Kunsten '92, Platform ACCT, Rotterdam Festivals and the digital information platform for performing arts, Stichting Digitaal Informatieplatform Podiumkunsten (DIP).
[237] "I tell you proudly how far my lines go back, how deep my roots are," said Dors. The annual Staat van het Theater [State of the Theatre] address was given by Dors op 1 September 2022 and can be watched or read here.
[238] For this study, they interviewed 13 people working in 11 different organizations in the cultural sector or responsible for policies in the area of defining and measuring diversity and inclusion. In addition, they analyzed the policy plans and tools of different institutions (Rana et al. 2022).

seen as different, as less than, not as you, but as your background. And yet, if we don't define and measure, we can't make effective policies and check whether there really is more diversity in the sector" (Rana et al. 2022).

With these words, they clearly address the dilemma of measurement, its inconvenience as well as its necessity. Rana and De Koning reveal that in the Netherlands labour market data, for example, is collected on the basis of gender, but that ethno-racial disadvantage or exclusion from the labour market is never or rarely documented. "Measuring inequity along ethno-racial lines provokes a lot of resistance, not only because of stereotyping, but also because it makes whiteness visible as an invisible norm and privilege. This is uncomfortable for many," note the researchers, addressing the underlying problem (Ibid.). The researchers' recommendation is to tailor diversity research at the organizational level. It is not necessary for everyone to use the same categories or terms, as it may be important for each institution to highlight (slightly) different aspects of diversity, representation or discrimination. At a sectoral level, however, they do see a greater need for consistency in measuring diversity – this is currently often sought in Statistics Netherlands categories[239] that are defined top-down and based on place of birth. Instead, Rana and De Koning argue for a move towards self-identification, with broader categories[240] that can monitor forms of hierarchy and exclusion. In addition, they found that the diversity policies that organizations outline (following the Diversity & Inclusion Code) often lack a clear problem analysis that focuses on what problem the policy is intended to address. This is also important when conducting diversity and inclusion research: clarifying the problem, what exactly needs to be monitored, and what the desired change is.

The picture painted by Rana and De Koning is confirmed by discussions with the sector for this theme page. The sector is fragmented when it comes to measuring diversity, and there is no clear consensus on a solution. On the one hand, there is a need for a responsible party to oversee the collection of comparable data, a party that is 'above the sector'. It would be desirable for the sector to measure in the same way. On the other hand, there is a need for customization at the micro level – each organization should measure in its own way in order to obtain the most relevant and applicable data for itself. Either way, it is clear that monitoring diversity and inclusion is essential[241] for good policy.

Inclusive language is crucial

Language shapes the way we think. It is therefore crucial to pay attention to inclusive language use if you want to conduct and communicate[242] equitable, representative and accessible research. There is often a focus on

[239] Similarly, Statistics Netherlands Barometer Culturele Diversiteit [Cultural Diversity Barometer] which provides insight into 'cultural' diversity in the job market. However, this measurement tool is outdated and still assumes a classification of the population based on migration background, using the categories 'western' and 'non-western' (see also Smaling 2022).

[240] The categories they suggest are: 1) Dutch nationality (yes/no), 2) Black, of colour and/or part of an ethnic minority (yes/no), 3) gender (m/f/x), 4) non-normative sexual or gender identity (yes/no), 5) level of education (primary school, secondary school, mbo, hbo, university), 6) age.

[241] Likewise, Jojanneke van der Toorn, associate professor of social and organisational psychology at Utrecht University and Leiden associate professor of inclusion of lesbian, homosexual, bisexual and transgender workers at work, agrees on the necessity of monitoring diversity and inclusion and setting a clear problem and objective in doing so in this article (Agterberg 2022).

[242] A number of sources underpinning this idea include Mounir Samuel's publication Waarden voor een nieuwe taal [Values for a new language] (2021) as well as his latest book Je mag ook niets meer zeggen [You can't say anything anymore either] (2023), Lera Boroditsky's 2017 TED talk, Women Inc.'s style guide to inclusive language use (2022), the National Museum of World Cultures' publication Woorden doen ertoe [Words Matter] or Maastricht University's guide to gender-inclusive language use (2022).

gender equity or neutrality in language, where the masculine form is still dominant. However, inclusive language use should not be limited to this alone. It is about being aware of any language that continues to reinforce dominant but outdated norms – because such language perpetuates stereotypes and/or exclusion.

The use of the words 'diversity' and 'inclusion' works against addressing the issues that the topic actually raises. Diversity and inclusion are generally seen as positive[243] issues; everyone is in favour of them and everyone wants to work on them: because, "Culture is by and for everyone", in the words of the former Minister of Education, Culture and Science Ingrid van Engelshoven (Engelshoven 2019). But discussing racism, discrimination, prejudice or whiteness is much more difficult, more painful and can be abrasive. Applying the right language to these issues can facilitate change. Conversely, 'skirting' around them with 'happy talk' about 'diversity' and 'inclusion' can be a barrier[244] to change. Using the right language, terms and categories in research and policy is therefore crucial.

Meanwhile, diversity monitoring is also raising awareness of the sensitivity of language and of which categories are useful and desirable for research. This is reflected, for example, in Statistics Netherlands' decision to replace the term 'migration background' with 'origin' and to abandon the use of the categories 'Western' and 'non-Western'. Instead, from 2022 (with retroactive effect), Statistics Netherlands will classify the population by origin, looking at the country of birth of a person and their parents. Nevertheless, we can still see colonial history in this classification: Statistics Netherlands divides the countries of origin into four levels, with the 'classical migration countries' (including Suriname, Indonesia and the Dutch Caribbean) forming a separate category. Measuring the integration of immigrants in itself, as well as the dichotomy it creates between people from 'here' and 'there', can be understood as a colonial structure of though, as Willem Schinkel has also critically noted (Schinkel 2018). This example of Statistics Netherlands shows the sensitivity of choosing the right language (and therefore categories for research) and that these choices can also be used to perpetuate and even feed[245] unwanted forms of prejudice or inequity.

5. CONCLUSION

There is currently, no long-term, large-scale quantitative data available on representation (or diversity), equity and inclusion in the cultural sector that can be tracked by the Culture Monitor. On this page therefore, we bring together the most important (small-scale) qualitative and quantitative studies on diversity, equity and inclusion in the cultural sector – at sector-wide, domain-specific and local levels. In addition, developments and desires in the sector's discourse on conducting research into diversity and inclusion will be collected on this page. In this way, the Culture Monitor aims to offer a helping hand to the sector and to anyone looking for ways to start monitoring diversity, equity and inclusion in their own organization.

243 Yet the way diversity and inclusiveness is steered is not seen as positive by everyone. See, for example, Pak 2020.
244 This idea was confirmed in a focus discussion with industry experts, although it also extends beyond the cultural sector. There are numerous (international) sources that further substantiate the idea of 'happy talk' about diversity, including Bell 2007, Ahmed 2012, Leiden University 2019, Nourhussen 2022 and Noor 2022.
245 This was also discussed, for example, in an article in *Trouw*, 'Ook nieuwe CBS- termen voor migranten zijn stigmatiserend' ['New Statistics Netherlands terms for migrants stigmatizing too'], on 16 June 2022.

What other research and data do we need?
We need quantitative data on representation, equity and inclusion in the cultural sector, figures that can be tracked serially at a national or local level. The basis for this is still lacking and there is a clear need for it. In addition, a number of other research needs have emerged from discussions with the sector.

For example, there is a need for a better understanding about people's sense of responsibility regarding inclusion. What is the awareness about inclusion, and what is the extent of the intrinsic desire to become truly inclusive? Are originally white institutions really changing, and are institutions willing to change their structures? This is not yet clear.

There is also the question of the extent to which organizations continue to buy into the 'hype' of diversity and inclusion. For example, when more people of colour enter the workforce of an organization where whiteness is dominant, will the organizations be able to retain these employees, or will they be abandoned due to a lack of inclusion and equity?

Also, how does the government itself implement the Diversity & Inclusion Code by supporting institutions and artists though the BIS and National Culture Funds? Who actually knows about the funding options, who applies for funding, and who ultimately receives it? For example, how important is it that applicants speak the 'language of the funds' and have some experience of writing grant applications? In short: what about accessibility and equal opportunity for different applicants for cultural funding?

What are our hopes for the future of this page?
In the coming years, we will continue to pay special attention to diversity, equity and inclusion on this page. These issues cut across all the themes covered by the Culture Monitor (from professional practice, culture and participation to culture in the regions) and domains (from heritage to games to performing arts). For this reason, we try to include trends and developments in the field of diversity, equity and inclusion in each of the domain reports. As diversity, equity and inclusion is an overarching issue, it also deserves its own landing page, which brings together information on the topic.

In the future, we hope to be able to publish quantitative datasets on diversity, equity and inclusion in the Culture Monitor, but the reality is that there is no clear insight yet into the creation of such long-term (sector-wide) datasets. The government's encouragement of partnerships between research institutions could help in this regard. The Boekman Foundation's Kennisagenda [Knowledge Agenda] also addresses the democratization of diversity[246] (Rasterhoff et al. 2022).

Going forward, the Culture Monitor, will explore how we can collect knowledge in a multivocal way, with the aim of ensuring that data about culture relate to all 'strata' of society.

[246] The Kennisagenda [Knowledge Agenda] states: "Culture should reflect the Netherlands in all its diversity. In recent years, many initiatives have been launched to democratize cultural practices. In policy, there is a lot of focus on 'diversity and inclusion' to achieve more diversity in the sector. But this also raises many questions: what kind of guidelines should apply to which institutions, and which ones are most effective? What does diversity mean when it is institutionalized?" (Rasterhoff et al. 2022, 7).

6. BIBLIOGRAPHY ON DIVERSITY AND INCLUSION IN THE DUTCH CULTURAL SECTOR

The bibliography below contains sources of studies into inclusion and diversity in the Dutch cultural sector, classified by ‘culture sector-wide’, ‘domain-specific’ and ‘local’, and in chronological order.

If you would like to suggest any additions or talk to us about research and data on diversity and inclusion, we would love to hear from you!

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7. WANT TO KNOW MORE ABOUT THIS THEME?

Want to read more about Diversity, Equity and Inclusion? Click on the following link for a list of available literature in the Boekman Foundation's Kennisbank [Knowledge Bank].

For a previous version of the text on this theme page (Dutch-only), see here.

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9. DISCUSSION PARTNERS

On 21 June 2022, a focus group was organized to gather information for this theme page. The following people were present:

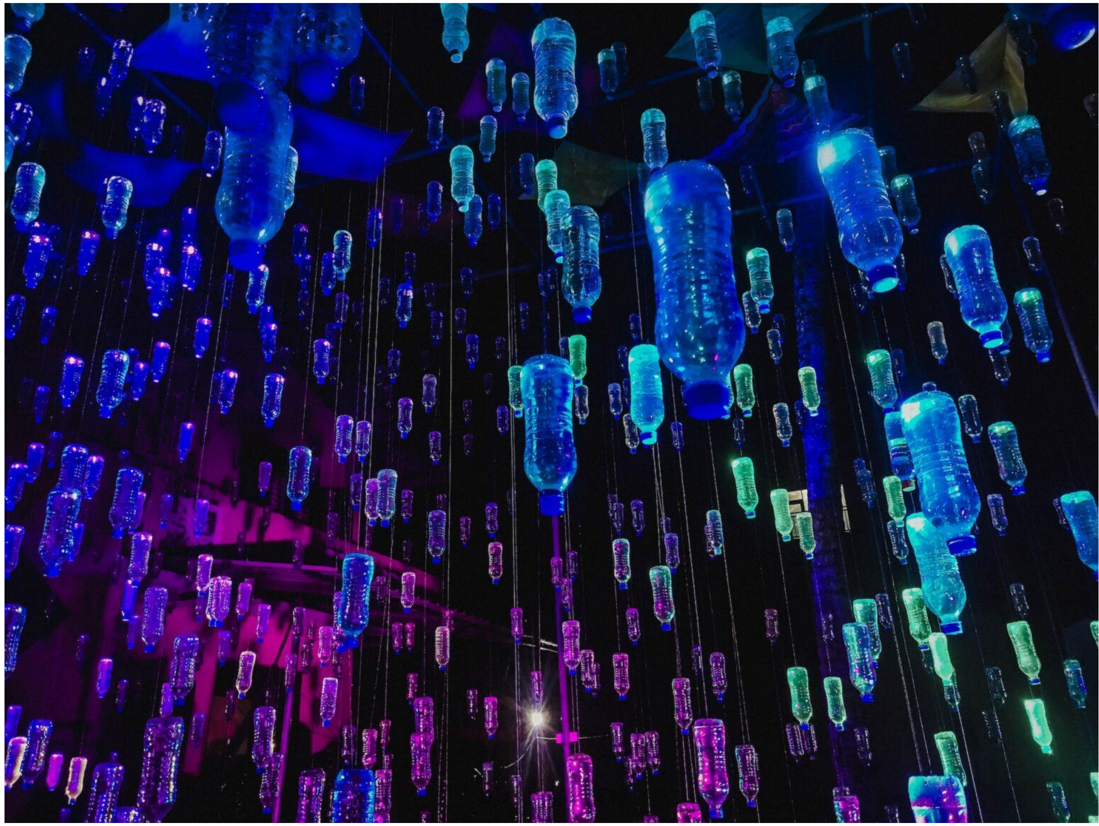
- Siela Ardjosemito-Jethoe (deputy director of Avans Hogeschool, then diversity and inclusion officer at the University of Arts, The Hague)
- Sjaiesta Badloe (policy advisor at Amsterdam Arts Council)
- Pauwke Berkers (professor of the sociology of pop music at Erasmus University Rotterdam)
- Viktorien van Hulst (director at the Performing Arts Fund NL)
- Anouk de Koning (cultural anthropologist and associate professor at Leiden University)
- Menno van der Pelt-Deen (founder of Games4Diversity)
- Jasmijn Rana (cultural anthropologist and assistant professor at Leiden University)
- Ebissé Wakjira (founder and publisher of the Dipsaus podcast, acquiring editor at Nederlandse Boekengids)
- Sakina Saouti (communication specialist at LKCA and then point of contact for the Diversity & Inclusion Code)
- Roy van der Schilden (writer and business director at Wispfire)

THEME: SUSTAINABILITY

Climate disasters and alarming reports on climate change seem to follow each other at an increasingly rapid rate. Energy prices are soaring. Public and societal expectations are changing, and cultural policy is increasingly focused on the climate crisis. So, for many reasons, sustainability will become an increasingly important issue for the cultural sector in the coming years. This data story explores the theme by looking at how the sector is working on sustainability, what role the climate crisis plays in the work of creators, and the potential impact of climate change on the sector.

Written by Bjorn Schrijen
Latest updated 1 June 2023

Photography: Don Kaveen via Unsplash



SUMMARY

The climate crisis and rising energy prices mean that sustainability is increasingly on the agenda of the cultural sector and cultural policy. Research shows that many cultural organizations are already working on sustainability. However, there are still opportunities to do this in a more structural way, and there are several stumbling blocks that could hinder further progress in sustainability. What's more, a comparison with other sectors shows that companies in the 'culture, sport and recreation' sector consider themselves to be the least sustainable and face above-average obstacles.

The role of the cultural sector in the climate crisis potentially goes beyond just reducing its own climate impact. Many artists and cultural organizations are addressing the issue in their work, or collaborating on creative solutions and new ideas for a more sustainable society. In addition, the power of designers and the historical knowledge and skills of (intangible) heritage can play an important role in climate adaptation. This is also an issue that the sector itself needs to think about in time to prepare for floods, droughts, extreme weather events and other consequences of climate change.

1. INTRODUCTION AND IMPORTANCE OF THE THEME

The climate crisis[247] is a colossal challenge for the world. Increasing levels of greenhouse gases in the atmosphere are warming the Earth, and the consequences are becoming increasingly apparent. Rising sea levels are expected to threaten the homes of 410 million people by 2100, and several (island) nations are likely to become uninhabitable within the next few decades (Storer 2021, Ainge Roy 2019). Extreme weather events and climate disasters are becoming more frequent and severe: floods in Pakistan, drought and famine in Kenya, and floods in the Netherlands, Belgium and Germany are just a few recent examples (NOS Nieuws 2022, Vos 2022). More than a million plant and animal species are threatened with extinction – and there are conceivable scenarios in which humans are one of them (Carrington 2022).

To minimize these impacts, nearly 200 countries agreed in 2015 to try to limit the global temperature increase to a maximum of 2 degrees Celsius, and ideally to 1.5 degrees Celsius (Rijksoverheid n.d.), compared to the start of the Industrial Revolution. To achieve this, global greenhouse gas emissions must be rapidly and significantly reduced . By 2030, the Netherlands aims to emit 60 per cent less CO_2 than in 1990, and to be climate neutral by 2050 (VVD et al. 2021). However, much remains to be done to achieve this: in 2021, CO_2 emissions were only 14 per cent lower than in 1990 (CBS n.d.).

[247] 'Climate crisis' is used in this text to denote the totality of climate change and its expected, or already noticeable, negative consequences. While there is a risk that this term may lose its power with too frequent repetition, it is used here to express a sense of urgency missing from a term such as 'climate change'.

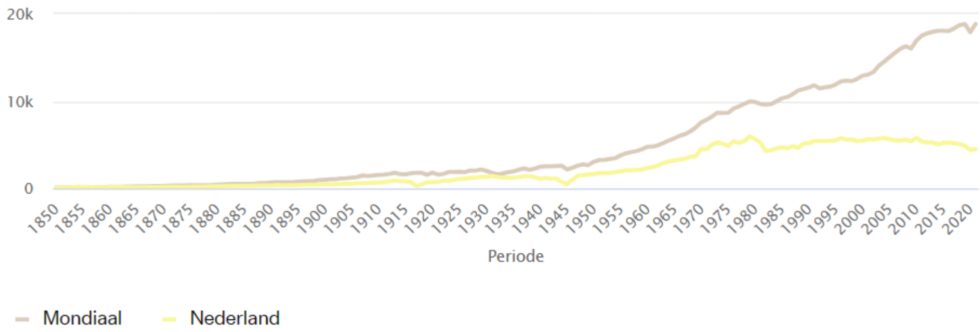


Figure 1. **Change in CO_2 emissions, globally and in the Netherlands, 1850-2021**
Index numbers with 1850 as base year
[Period; Global; The Netherlands]
Sources: Ritchie et al. 2020, Compendium voor de Leefomgeving 2020, Haustein et al. n.d.

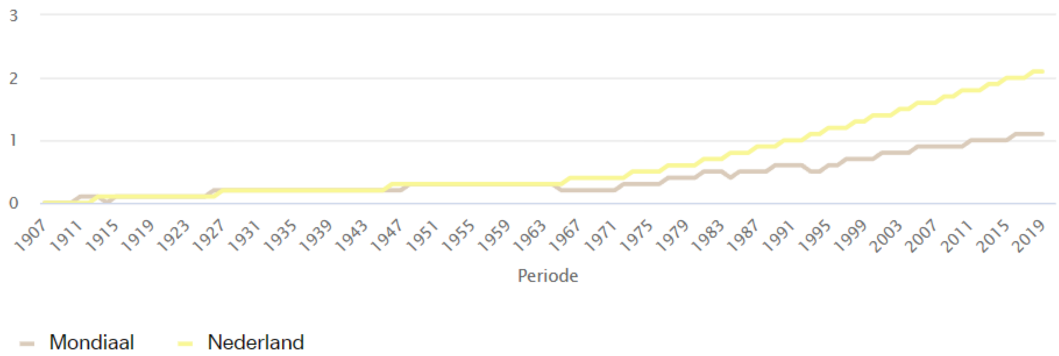


Figure 2. **Increase in average temperatures, globally and in the Netherlands, 1907-2019**
°C, with 1907 as base year
[Period; Global; The Netherlands]
Sources: Ritchie et al. 2020, Compendium voor de Leefomgeving 2020, Haustein et al. n.d.

CO_2 emissions and temperature increase

The following visualizations show how CO_2 emissions (from the burning of fossil fuels) have increased globally and in the Netherlands since 1850, and how average temperatures have increased globally and in the Netherlands since 1907.

Achieving such a large CO_2 reduction is a challenge for everyone and it will be increasingly important for the cultural sector to make buildings, programmes and productions more sustainable in the years to come. This is driven not only by the climate crisis itself, but also by future legislation and regulation, as well as changing public and societal expectations. Equally important is the role that arts and culture can play in creating content that raises awareness of the climate crisis. Artists and cultural practitioners can disrupt and activate, and contribute to the creative ideas and solutions needed to tackle the climate crisis.

In 2019, research revealed that a considerable portion of the cultural sector is making strides toward sustainability to some degree. However, for the majority of organizations, with a few inspiring pioneers as exceptions, these efforts are more incidental than structural (Schrijen 2019). Currently, there seems to be momentum building to strengthen and accelerate the sector's sustainability efforts. Firstly, high energy prices have led to calls for an acceleration of sustainability.[248] In addition, the focus on sustainability within (national) cultural policy is increasing. For example, the Council for Culture is working on an advisory report on this theme (Raad voor Cultuur 2022), State Secretary Uslu announced in her multi-year policy paper that resources will be made available to make monuments and museums more sustainable, (Uslu 2022a), and a new sustainability team has started work within the Ministry of Education, Culture and Science.

Given the extreme urgency of the climate crisis, its growing importance for the cultural sector and the growing political commitment to address it, sustainability is one of the themes[249] monitored in the Culture Monitor. To this end, this page looks in turn at three themes: to what extent and how the cultural sector itself is becoming sustainable ('Climate Impact'), the role of the climate crisis in the work of cultural practitioners ('Climate Shadow') and the impact of climate change on the cultural sector ('Climate Adaptation'). The main sources here are the studies on sustainability in the cultural sector carried out by the Boekman Foundation and Bureau 8080 since 2019 (Schrijen 2019, Schrijen 2020, Schrijen et al. 2022, Schrijen et al. 2023).

2. Climate impact – How is the cultural sector working towards sustainability?

From the electricity needed to light a stage to the water used to flush museum toilets, and from the metals in a game console to the pages of a new novel, the cultural sector uses energy and raw materials in many different ways. As such, the sector has an impact[250] on the climate. However, it is currently difficult to say exactly how big this impact is. Statistics Netherlands publishes figures for the composite sectors ‘Culture, sports and recreation’ and ‘Culture, recreation and other services’. However, these figures only partly[251] overlap with the cultural sector, and only concern the direct energy consumption of organizations in the sector itself (CBS 2022a, CBS 2022c). However, much of the cultural sector's climate impact[252] is indirect: for example, through productions, catering or the travel movements of creators and audiences.

Energy consumption and CO_2 emissions of ‘culture, sport and recreation’

Although, for the reasons mentioned above, the figures from Statistics Netherlands on the energy consumption and CO_2 emissions of the ‘culture, sport and recreation’ sector can only give a very rough estimate of the climate impact of the cultural sector, they have been included in the visualizations below as an indication.

[248] For example, the Cultural and Creative Sector Taskforce called for support for sustainability in a pressing letter (Kunsten '92 2022) and parliamentary questions were also raised about this (Wuite et al. 2022, Uslu 2022b).
[249] In addition, 'sustainability' together with 'diversity, equality and inclusion' and 'cultural professional practice' is one of the three core themes in the Boekman Foundation's entire work in the period 2021-2024 (Boekman Foundation 2020).
[250] Climate impact is understood here as the consumption of energy and raw materials and the resulting pollution and greenhouse gas emissions.
[251] The composite sector 'Culture, sport and recreation' encompasses much more than just cultural organizations, but simultaneously several domains counted as cultural and creative industries in the Culture Monitor also fall outside this demarcation.
[252] For more on charting the climate impact of the cultural sector, see also Bokhorst 2022.

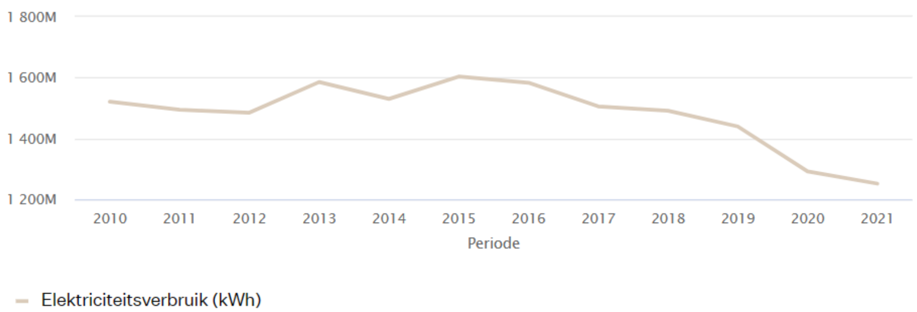


Figure 1. **Electricity usage of the 'culture, sport and recreation' sector, 2010-2021**
kWh
[Period; Electricity usage (kWh)]
Sources: CBS 2022a, 2022c

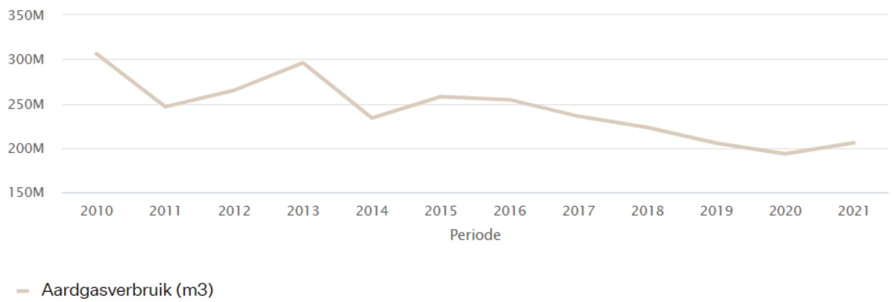


Figure 2. **Natural gas usage of the 'culture, sport and recreation' sector, 2010-2021**
m3
[Period; Natural gas usage (m3)]
Sources: CBS 2022a, 2022c

Although the climate impact of the cultural sector is relatively[253] small compared to the overall climate impact of the Netherlands, it too will eventually have to decrease in order to contribute to the nation's climate ambitions, to comply with (future) laws and regulations and to meet the changing expectations of partners, audiences and funding bodies. There are many ways[254] in which cultural organizations can become more sustainable, and in practice there are also many good, creative and inspiring ways in which organizations are doing this. For example, in the Music domain, festivals are at the forefront of sustainability and circularity; in the Audio-Visual domain there is a lot of thinking about making productions more sustainable (see, for instance, Nederlands Filmfonds 2022), and in the Literature domain, new ways of printing and distributing books more sustainably are being experimented with (see Klein Lankforst 2019, Dessing 2022) – to name just a few examples.[255]

[253] However, this does not make emissions any less substantial in absolute terms. To illustrate, the 402 million kg of CO2 emitted by the 'Culture, sport and recreation' sector alone in 2020 is a significant proportion of the 3,750 million kg of CO2 that the approximately 150 million trees in the Netherlands can absorb annually (estimate based on Oude Elferink 2015, Geelen 2020, Ecotree s.a.). Another example comes from the UK, where the Arts Council calculated that nearly 115,000 trees had to grow for a century to absorb the amount of CO2 that 747 cultural organizations were responsible for in the 2018/2019 season (Arts Council England 2020).

[254] Does your cultural organization want to work on sustainability, or as a policymaker support the sector in doing so? There is a lot of knowledge and information available that can help you do this. The free publication 'Towards a sustainable cultural sector' from June 2021. contains descriptions and references to more than 40 tools, manuals and organizations - for both organizations that are just starting out with sustainability and organizations that are already further along in this process. This publication includes links so you can immediately click through to the information relevant to your practice.

[255] Many more examples are collected in the publication 'Sustainability in the cultural sector 2022/2023 - Qualitative part' (Schrijen et al. 2023).

For a sector-wide inventory of how cultural organizations are working on sustainability the Boekman Foundation and Bureau 8080 will conduct an additional survey of about 200 cultural organizations in 2019 and 2022 (Schrijen 2019, Schrijen et al. 2022). Although the results of this survey cannot be assumed to be representative,[256] they are based on a sample that does justice to the diversity of organizations in the cultural sector, both in terms of type of cultural organization, size and housing situation.[257]

Firstly, the results show that the motivation to become more sustainable is high. Respondents rated the importance of becoming more sustainable in 2022 – both for their own organization and the cultural sector as a whole – at 8.8 on a scale of 1 ('very unimportant') to 10 ('very important'). This high level of motivation stems mainly from intrinsic reasons ('because we think this is important as an organization', 'because we see this as our responsibility', 'because we want to communicate the importance of sustainability to our visitors'), followed by reasons related to the importance of their own organization ('to be prepared for future developments or regulations', 'because it is good for our image', 'because of high energy prices').

Almost all respondents are also already working on sustainability in practice, with the extent to which this is happening being rated on average at 6.2 on a scale of 0 ('not at all active') to 10 ('very active'). This is somewhat similar to the situation in 2019, when most respondents rated themselves as 'somewhat active' or 'fairly active'. The ways in which organizations work on sustainability vary widely, but the three activities most frequently mentioned by respondents are separating (at least three types of) waste, taking climate into account in programming, and encouraging employees to travel by public transport.

Motivation and activity for sustainability

The graphs below show how important sustainability is to cultural sector organizations surveyed, and how active they are in achieving it.

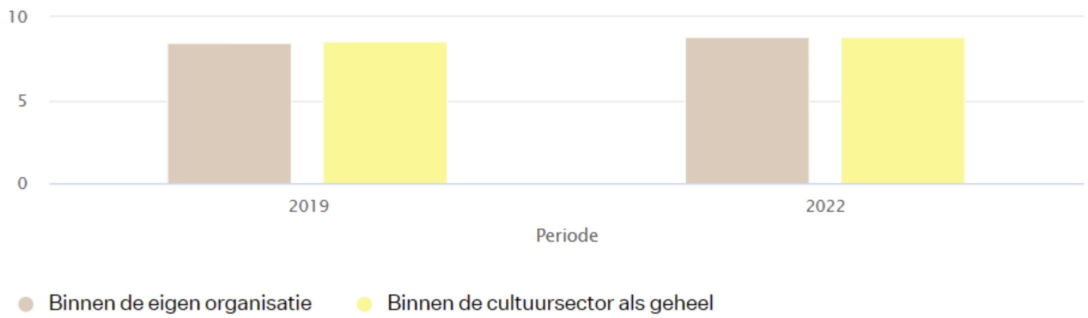


Figure 1. **Perceived importance of sustainability on a scale from 1 ('Very unimportant') to 10 ('Very important'), 2019 and 2022**
Average of all respondents
[Period; In the organization; In the cultural sector as a whole]
Sources: Schrijen 2019, Schrijen et al. 2022

[256] This is firstly because the sample size is relatively small, and does not perfectly reflect the composition of the cultural sector. In addition, the survey was completed by respondents on a voluntary basis, so it is possible that mainly respondents who are above averagely motivated to become more sustainable responded. Finally, most questions involved self-assessment, so social desirability may also have played a role in the answers.
[257] This is relevant because it may matter for the sustainability potential whether a building is rented or owned, and whether it is shared or only used by the own organization.

The above comparison between 2019 and 2022 already shows that the motivation to become more sustainable and the extent to which this is achieved have remained almost the same over this period. The same applies to the extent to which sustainability is a structural part of the operations of the organizations surveyed. In 2019, 27.4 per cent of the organizations surveyed had set out efforts to become more sustainable in a plan, 39.4 per cent had made people responsible for carrying out these efforts, and 14.9 per cent were (numerically) monitoring the progress made. Although these percentages were slightly higher in e2022, (at 36.1, 42.6 and 17.7 per cent respectively), they still concern a minority of organizations.

Figure 2. **Extent of activity for sustainability, 2019**
% of all respondents
[Not active: 7.7; A little active 36.2; Relatively active: 40.1; Very active 15.9]
Sources: Schrijen 2019, Schrijen et al. 2022

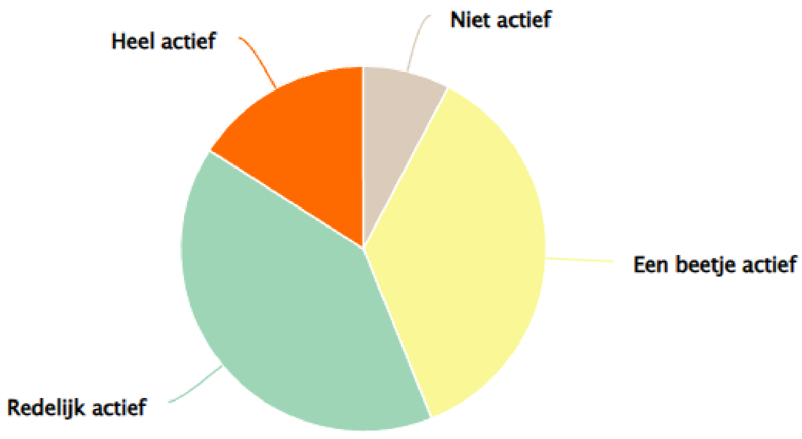
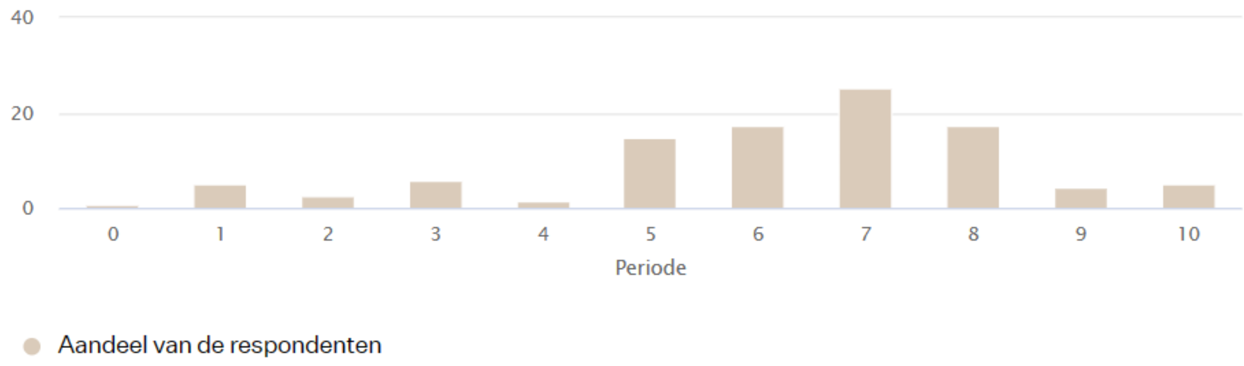


Figure 3. **Extent of activity for sustainability on a scale from 0 ('Not at all active') to 10 ('Very active'), 2022**
% of all respondents
[Period; Proportion of respondents]
Sources: Schrijen 2019, Schrijen et al. 2022



Sustainability in organizations

The first graph in the visualization below shows the different ways in which sustainability can be invested in structurally, and the proportion of surveyed organizations to which these ways apply. The second graph provides an insight into the support for sustainability within the organizations surveyed.

Het structureel verankeren binnen de bedrijfsvoering kan voor veel organisaties dus nog een belangrijke stap zijn om verder te verduurzamen – iets wat ruim 80 procent van de organisaties aangeeft in de komende jaren te willen doen. Daarbij worden echter door een groot deel van de ondervraagden knelpunten ervaren, waarbij een gebrek aan financiële middelen, afhankelijkheid van andere partijen en een hogere prioriteit voor andere onderwerpen de meest genoemde zijn. De behoeften die er zijn, volgen logisch uit deze knelpunten: geld, begeleiding en ondersteuning, informatie en inspiratie, medewerking van andere partijen (zoals een verhuurder) en beleid (bijvoorbeeld voor duidelijke richtlijnen, financiële ondersteuning of een verplichting als stok achter de deur).

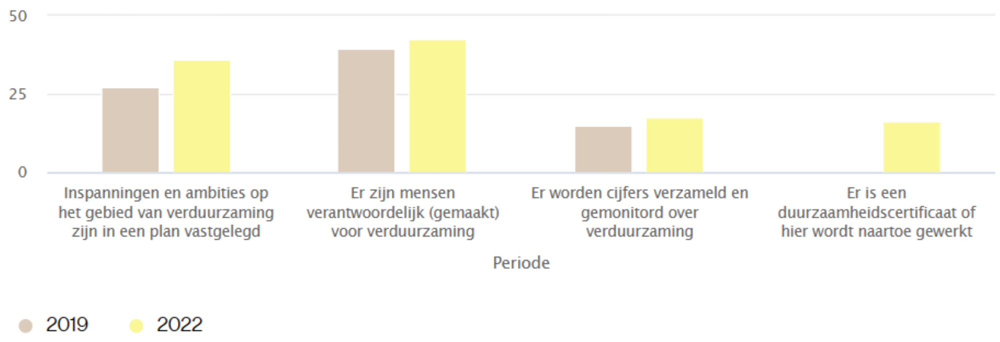


Figure 1. **Extent of structural investment in the following areas, 2019 and 2022**
% of all respondents
[Efforts and ambitions for sustainability have been defined in a plan; People are in charge of sustainability; Figures on sustainability are collected and monitored; A sustainability certificate has been obtained or efforts made to obtain one]

Figure 2. **Support for sustainability in organizations, 2019 and 2022**
% of all respondents who agree (strongly) with the following statements
[Employees in my organization are aware of the need for sustainability within the organization; Employees in my organization actively work towards sustainability in the organization; Employees of my organization want to accelerate sustainability developments in the organization]
Sources: Schrijen 2019, Schrijen et al. 2022

Future ambitions and obstacles

The graphs below show what percentage of cultural organizations want to work more actively towards sustainability in the future, and what obstacles (may) stand in the way of this.

Finally, it is also interesting in this context to look at the research carried out by Statistics Netherlands on sustainability in various sectors in 2022. It shows that 76 per cent of companies surveyed in the 'Culture, sports and recreation' sector took measures to become more sustainable – among companies across all sectors, the figure is 79 per cent. What is particularly striking, however, is that the companies in 'Culture, sports and recreation' consider themselves to be the least sustainable of all companies and, after hotels and restaurants, also experience the most barriers to further sustainability. These are mainly financial barriers: 30 per cent of companies in 'Culture, sports and recreation' cite a lack of financial resources, while this applies to 13 per cent of all companies (Statistics Netherlands 2022b).

Figure 1. **Percentage of organizations surveyed with plans to be more active in sustainability in the future, 2019 and 2022**
% of all respondents
Sources: Schrijen 2019, Schrijen et al. 2022

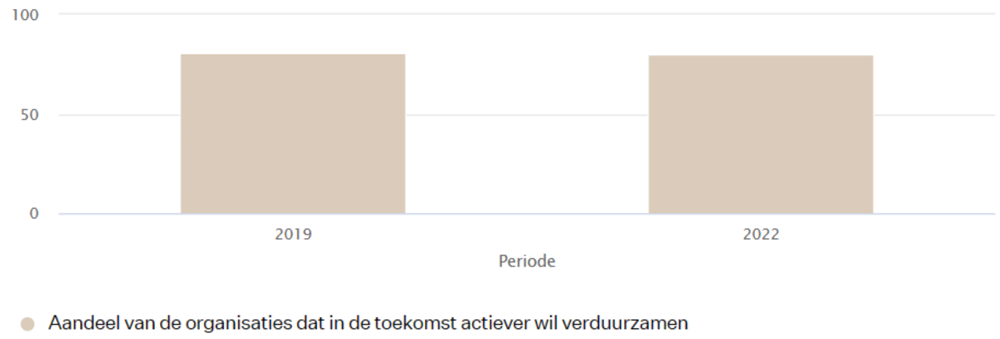
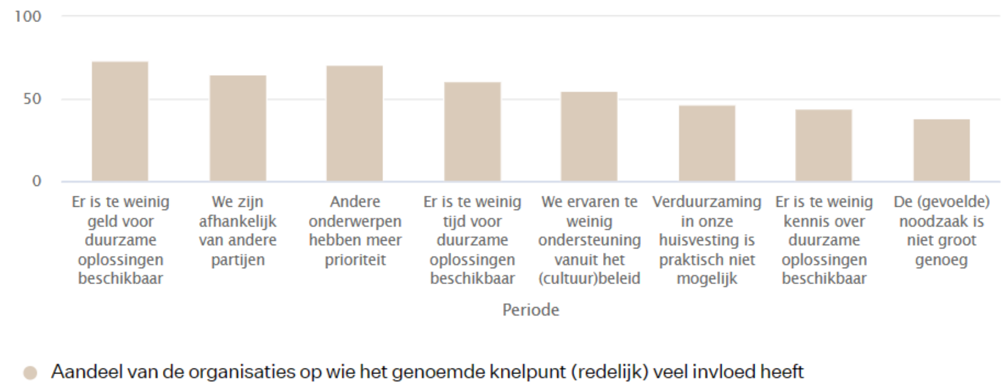


Figure 2. **Key obstacles to sustainability, 2022**
% of all respondents who agree that the stated obstacle has (quite) an influence
[Lack of funding for sustainable solutions;
We are dependent on others;
Other issues take priority;
Lack of time for sustainable solutions;
There is insufficient (cultural) political support;
Sustainable practices are not possible in our premises;
Lack of knowledge about sustainable solutions;
The (perceived) need is not great enough]
Sources: Schrijen 2019, Schrijen et al. 2022



Sustainability in 'Culture, sport and recreation' compared to other sectors

The figures below show statistics on sustainability in the 'Culture, sport and recreation' sector compared with the average for companies in the Dutch economy as a whole.

Figure 1. **Sustainability measures taken in 2022**
% of all respondents
[Culture, sport and recreation; Economy as a whole]
[None;
Mainly energy;
Mainly emissions;
Mainly on materials and waste;
A combination of the above;
Other area]
Source: CBS 2022

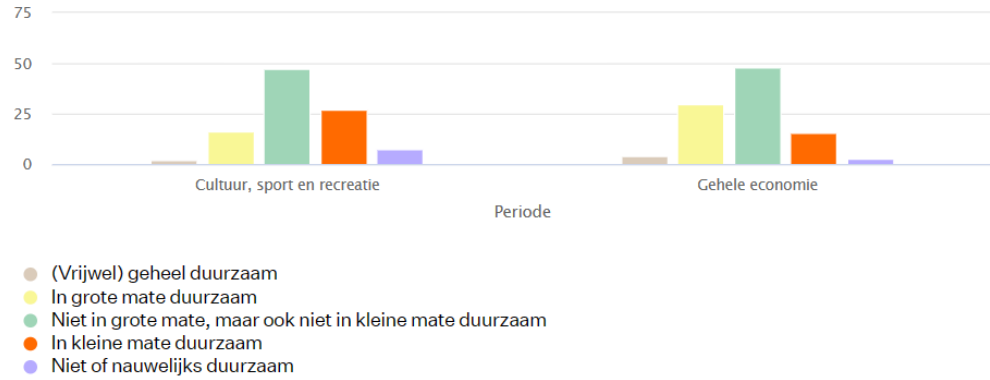
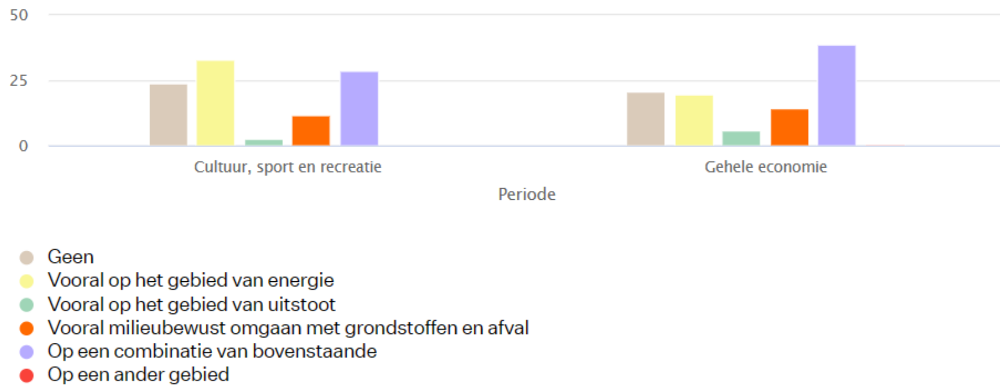


Figure 2. **Sustainability self-assessment in 2022**
% of all respondents
[Culture, sport and recreation; Economy as a whole]
(Almost) no sustainability;
Neither much or little sustainability;
Not or hardly sustainable;
Largely sustainable;
Sustainable to a small extent]
Source: CBS 2022



3. CLIMATE SHADOW – WHAT ROLE DOES THE CLIMATE CRISIS PLAY IN THE WORK OF CREATIVES?

While it is important for the cultural sector to become more sustainable, the role that art and culture can play in the climate crisis goes beyond its own climate impact. Indeed, while climate reports and news reports communicate mainly with the mind, art can also reach people's hearts. Art can activate and get people moving. It can disrupt, helping to expose and break down entrenched thought patterns that have led to the climate crisis. Art can offer future scenarios and perspectives for action, showing what will be lost if no action is taken (Schrijen et al. 2022; see also, for example, Boeckel 2022, Jans

2022). An interesting way to distinguish this more substantial role in the climate crisis from the sector's climate impact is through the concept of 'climate shadow'.[258]

In practice, there are many – and apparently more and more – artists and cultural organizations that fulfil this role with (part of) their work. Exhibitions, theatre performances, songs, poetry collections, novels, films, visual artworks, games: within each discipline, there are numerous examples[259] of 'climate art'. Moreover, there is a growing call for artists and creative practitioners to actively participate more frequently in shaping and developing solutions to the climate crisis. At the end of 2022, for example, State Secretary Uslu wrote in her multi-year letter for the period 2023-2025 that "we need artists, designers and other creative professionals to tackle complex transitions", because they "hold the tools to deal with change and (...) can explore and imagine new futures" (Uslu 2022a). Certainly, in many creatives in the domains of Architecture and Design, are already actively working on this.

Figure 3. **Obstacles to sustainability in 2022**
% of all respondents
[Culture, sport and recreation; Economy as a whole]
[We do not experience obstacles; We don't know how to (further) improve sustainability; Lack of resources;Lack of personnel within the organization to implement; Dependence on third parties; It does not bring enough benefits (e.g. competitive or financial); Other reasons]
Source: CBS 2022

Although it is difficult to pinpoint the extent to which artists and cultural organizations are addressing the climate crisis in their work (and whether this is increasing or decreasing over the years), research by the Boekman Foundation and Bureau 8080 provides an indication. As part of a survey of the cultural sector conducted in 2022, a question was asked about the share of climate-related work within the overall production or programming. Although this questionnaire

[258] Journalist Emma Pattee introduced the concept of climate shadow in 2021 to think about a person's role within the climate crisis in a more comprehensive way. She describes the term as follows: 'Enter: the "climate shadow," a concept that I created to help each of us visualize how the sum of our life's choices influence the climate emergency. Think of your climate shadow as a dark shape stretching out behind you. Everywhere you go, it goes too, tallying not just your air conditioning use and the gas mileage of your car, but also how you vote, how many children you choose to have, where you work, how you invest your money, how much you talk about climate change, and whether your words amplify urgency, apathy, or denial' (Pattee 2021).
[259] For more examples, see also the publication 'Sustainability in the cultural sector 2022/2023 - Qualitative part' (Schrijen et al. 2023).

has several limitations,[260] the results show that 59 per cent of the organizations surveyed have produced work in which the climate crisis has played an important role in the last five years, and 53 per cent of the organizations are already sure that they will do so in the next two years as well (Schrijen et al. 2022). Previous research has also shown that in 2017, climate-related activities were mentioned in 24 per cent of the annual reports of basic cultural infrastructure (BIS) institutions. This share increased[261] to 30 per cent in 2018 and 55 per cent in 2019 (Schrijen 2020).

Climate related work in the production and/or programming of cultural organizations

The numbers in the visualization on this page what proportion of cultural organizations' production and/or programming has been dedicated to the climate crisis over the past five years, and what proportion is expected to be dedicated over the next two years.

Figure 1. **Percentage of works dedicated to the climate crisis in production and/or programming over the past five years**
% of all respondents
[Percentage of 'climate art' in total programming and production; Don't know]
Source: Schrijen et al. 2022

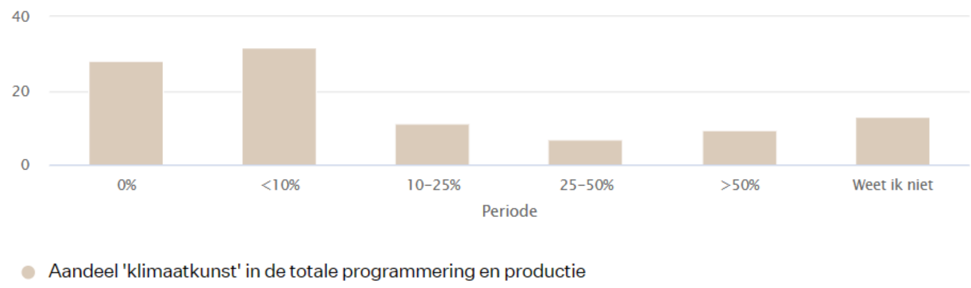
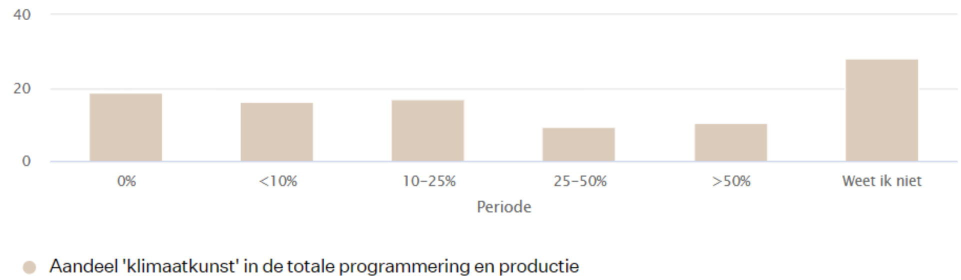


Figure 2. **Expected proportion of works dedicated to the climate crisis in production and/or programming in the next two years**
% of all respondents
[Percentage of 'climate art' in total programming and production; Don't know]
Source: Schrijen et al. 2022



[260] Partly due to the fact that this was one of the last questions in a relatively extensive survey, the question was answered by relatively few respondents (117). In addition, these were possibly mainly respondents with above-average involvement in the climate crisis and sustainability. Finally, the questionnaire inquired about work in which 'according to you, sustainability and/or the climate crisis was an important issue'. This is therefore a subjective assessment by respondents.
[261] It should be noted that 75 and 78 annual reports were analysed for 2017 and 2018, respectively. For 2019, only 22 annual reports could be reviewed at the time of the survey.

4. CLIMATE ADAPTATION – HOW DOES THE CLIMATE CRISIS AFFECT THE SECTOR?

The previous section discussed how the cultural sector affects or can affect the climate through its own climate impact and climate shadow. However, the reverse is also true: climate change can also affect the cultural sector. For example, cultural organizations and event organizers will need to take into account a climate in which more extreme weather conditions – such as storms, heavy precipitation or heat and drought – will become more frequent. For cultural heritage in particular, floods and droughts pose major risks (Kennisportaal Klimaatadapatie n.d.). The risk of flooding in this regard is obvious and by no means remote. For example, much of Bonaire's cultural heritage is threatened by climate change this century (Drayer 2022), and three museums and 65 monuments in Limburg were affected by flooding in 2021 (Welters 2022). Drought can additionally contribute to land subsidence, which can damage (the foundations of) historical buildings or archaeological sites.

In September 2022, a report commissioned by the European Commission underlined the need to better protect heritage sites from these hazards and thus make them climate adaptive (Leissner et al. 2022). In the Netherlands, there is not yet a specific adaptation policy for heritage yet (Kennisportaal Klimaatadapatie 2021), although there are examples[262] of projects working on making heritage more climate-adaptive. There are also several things that monument owners or heritage institutions can do themselves to identify risks in time and be prepared for them (see, for example, Kennisportaal Klimaatadapatie n.d. and Welters 2022).

In addition to thinking about its own climate adaptation, the cultural sector can also play a role in the broader climate adaptation of the Netherlands. For example, architects and designers are working on designs prepared for the future, but the Heritage domain is increasingly using ideas from the past for this purpose. A lot of historical, local, and specific knowledge and skills are embedded in (intangible) heritage that can play a role in sustainability or climate adaptation. One example is the use of historic water mills to regulate water levels in times of drought. In addition, heritage can contribute to a sense of connection with one another and the environment – and a desire to take care of them (Kennisportaal Klimaatadapatie n.d., Bakels et al. 2021). The use of past knowledge for a sustainable and climate-adapted future is promoted by the Erfgoeddeal [Heritage Deal],[263] which was extended by State Secretary Uslu at the end of 2022 until the end of 2025 (Uslu 2022a).

Finally, in addition to the direct impacts of climate change, a more indirect consequence is that climate change and the climate crisis are likely to lead audiences, partners, and funders to have more sustainable expectations. Research[264] on over 11,000 UK cultural audience members already provides insight into this, showing that some expectations are shared by a large proportion of audiences (see figures below) (Raines et al. 2022). Ultimately, these expectations may be reflected in the choices made by audiences

[262] See https://www.erfgoeddeal.nl/projecten for examples of projects.
[263] See https://www.erfgoeddeal.nl/programma/over-de-erfgoed-deal for more information on the programme.
[264] Preparation for similar research among Dutch cultural visitors is underway at the University of Groningen.

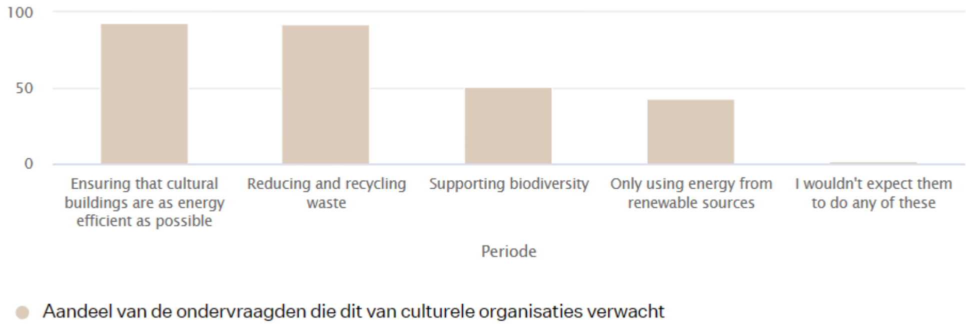
and partners – although action[265] is already being taken, for example, against cultural organizations sponsored by the fossil fuel industry.

British cultural audiences' experiences of the sustainability of cultural organizations

The three figures on this and next page show the sustainability expectations of around 11,000 British cultural audience members have regarding cultural organizations. The percentages show what proportion of respondents have a particular expectation.

Figure 1. **Sustainability expectations of British cultural audiences regarding productions**
% of all respondents expecting the above measures from cultural organizations]
Source: Raines et al. 2022

Figure 2. **Sustainability expectations of British cultural audiences regarding buildings**
% of all respondents expecting the above measures from cultural organizations
Source: Raines et al. 2022



[265] In addition, 2022 also saw action in cultural organizations, with activists mostly smearing artworks and gluing themselves to them. However, these actions did not focus so much on the organizations concerned as that the notoriety of the artworks being used to draw attention to the climate crisis.

6. CONCLUSION

Sustainability will become an increasingly important issue for the cultural sector in the coming years. The need to make the sector itself more sustainable is growing for a number of reasons, as is the attention paid to the issue in national cultural policy. A number of barriers need to be addressed in order to accelerate the process of making the cultural sector more sustainable. Cultural organizations can also embed sustainability more structurally into their business operations. The cultural sector has the potential to play a significant role in addressing the climate crisis. Artists, with their creativity, can contribute to raising awareness, driving change, offering new solutions, and facilitating adaptation to climate change and are increasingly being explicitly involved in these efforts. The Culture Monitor will continue to monitor these developments. A particular focus will be on trying to capture the climate impacts of the cultural sector better than is currently possible. This would allow better monitoring of the sector's progress – and allow policy makers to make adjustments where necessary.

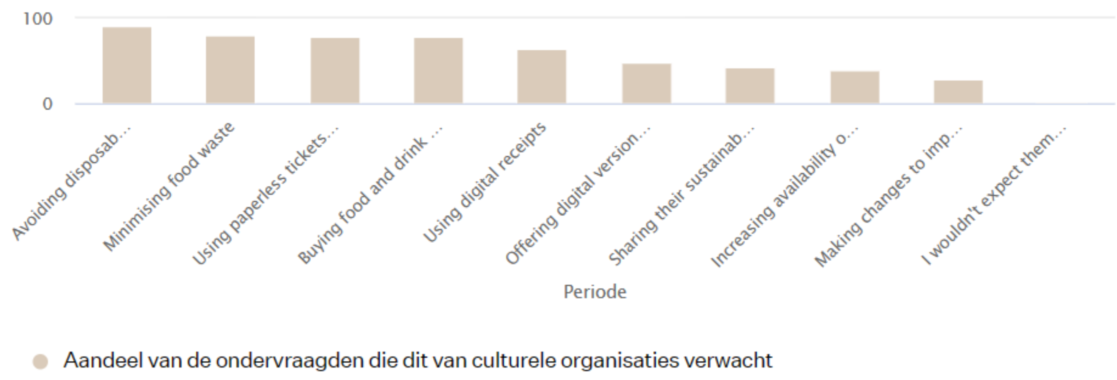


Figure 3. **Sustainability expectations of British cultural audiences regarding management**
% of all respondents expecting the above measures from cultural organizations
[Avoiding disposable packaging and single-use plastic; Minimising food waste; Using paperless tickets/digital tickets; Buying food and drink from local suppliers; Using digital receipts; Offering digital versions of programmes (if applicable); Sharing their sustainability policy with audiences; Increasing availability of plant-bases options; Making changes to improve website sustainability; I wouldn't expect them to do any of these]
Source: Raines et al. 2022

7. WANT TO KNOW MORE ABOUT SUSTAINABILITY?

Sustainability is one of the three core themes of the Boekman Foundation in the period 2021-2024 (Boekman Foundation 2020). All publications issued by the Boekman Foundation on this theme can be found in the online Sustainability dossier.

In addition, articles and (research) publications on sustainability in the cultural sector are also actively collected in the Knowledge Bank. At the time of writing, over 650 titles are available. A previous edition of the text on this theme page (Dutch only) can be found here.

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THEME: CULTURE IN THE REGIONS

How is the cultural offer distributed across the provinces? Where are the most venues, libraries, cinemas or museums? How many people participate in cultural activities? How is cultural spending distributed between the national government and the provinces? This theme page shows provincial developments and is an invitation to explore regional cultural figures in the Dashboard.

Written by
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Last update 22 December 2022

Photography: Martin Baudoin via Unsplash

CULTURE IN THE REGIONS

SUMMARY

Attention to local and regional cultural policy is growing. This is evident from, among other things, the attention paid to urban cultural regions, the concern for basic cultural facilities in municipal policy and the increasing number of provinces with their own culture monitors. To make cultural figures available at regional level and to provide insight into regional differences, the Boekman Foundation and Atlas Research launched the Regionale Cultuurmonitor [Regional Culture Monitor] in 2022. This Culture in the Regions theme page complements the findings of the Regional Culture Monitor with additional data and information from provincial and local monitors. In doing so, this page provides an insight into the uniqueness of the provinces in terms of cultural offerings, audiences and money flows.

1. INTRODUCTION AND IMPORTANCE OF THE TOPIC

Local governments play an indispensable role In the implementation of Dutch cultural policy. In 2021, Dutch municipalities collectively bore 54 per cent of the total cultural burden at government level, the provinces 8 per cent and the state 38 per cent[266] (Ministerie van Onderwijs, Cultuur en Wetenschap 2022; CBS 2020). They are responsible for funding local and regional infrastructure, such as libraries, venues and arts centres. Because culture should be accessible to everyone, the Rutte III cabinet encouraged regional distribution and invested extra in cultural participation (VVD et al. 2021). The accessibility and inclusivity of cultural activities are also on the agenda of many of the provincial coalition agreements and culture is linked to the image and identity of the region (Verberk 2019). Responsibilities in the field of culture are set out in the Algemeen kader interbestuurlijke verhoudingen cultuur [General Framework for Intergovernmental Cultural Relations].[267] However, according to the Interprovincial Consultation (IPO), this is due for renewal to better reflect cultural policy in practice (IPO 2022).

From the perspective of national cultural policy, regional culture could use more support, as the Council for Culture already concluded in 2017 (Raad voor Cultuur 2017). This was confirmed in the research report *Op weg naar herpositionering* [*Towards repositioning*] by Berenschot in November 2022. Among other things, efforts are being made to strengthen cooperation between the state and the region through fifteen urban cultural regions. However, a recently published evaluation report found that the cultural regions vary greatly in composition and size, making a comparable approach or interpretation of cooperation difficult. In addition, the demarcation of the regions is not evenly distributed across the country, which has resulted in a large number of municipalities in the provinces of Limburg, Gelderland, South Holland and North Holland not being represented in an urban region (Nijboer et al. 2022). Berenschot argues for strengthening the joint role of the

[266] The national government's share has increased compared to 2019. In 2019, the central government bore less than a third of the total culture burden at government level, Dutch municipalities collectively 60 per cent and provinces 11 per cent (Ministry of Education, Culture and Science 2020; Holst et al. 2020).
[267] Compiled by OCW, IPO and VNG. See the full framework here.

provinces.[268] The cultural system – with its many interdependencies – will benefit if the state, provinces and municipalities approach the system together "as one government" (Wijn et al. 2022, 4).

The relationship between national goals and local ambitions offers room for improvement. The distribution of culture across the country is an important spearhead, but there is also a need for a better match[269] between supply and visitors. The availability of regional cultural data can help here. How are cultural institutions distributed across the country? What do we know, for example, about cultural participation in the various provinces? And how are subsidies distributed in the Netherlands: both geographically and between the different levels of government and domains?

Together with Atlas Research, the Boekman Foundation produced the Regional Culture Monitor in 2022: an overview of regional culture figures that allows for comparison between the twelve provinces. To ensure this comparability, 2019 was chosen as the reference year.[270] Much of the data is integrated into the Culture Monitor Dashboard. Through this Dashboard, both national and regional data can be consulted. This gives an insight into inter-regional relationships and distribution patterns, but also shows where data is still missing.

The Culture in the Regions theme page is above all an invitation to explore the Dashboard and discover striking patterns at a provincial level. In doing so, we hope to contribute to the further harmonization and comparability of regional culture data.

The need for regional cultural data is demonstrated by the growing number of monitoring initiatives at the local level. North Brabant, Zeeland, Gelderland, Drenthe and Flevoland already have a provincial culture monitor, while South Holland and Friesland are currently developing their own culture monitors. Similar initiatives can also be found for cities, for example the Basismonitor for the municipality of Groningen and the Utrecht Monitor, or in metropolitan areas, for example the Cultuurmonitor of the Amsterdam Metropolitan Area (AMA). Where relevant, we link these monitoring initiatives to the highlighted cultural data. At the bottom of the page you will find a (non-exhaustive) overview of what monitoring is available per province.

2. CULTURAL OFFERING

The Netherlands is home to a diverse range of culture. From the Princessehof ceramics museum in Leeuwarden and the LUX cinema in Nijmegen, to the landscape art of sculptor Antony Gormley on the Markermeer and the annual Pinkpop festival in Landgraaf. The Culture Monitor's Dashboard shows how many offerings each province has and how this relates to the number of inhabitants.

Supply at province level

The visualizations on the next page show a selection of cultural supply indicators per province. On the Culture Monitor web page, tabs and toggles allow you to switch to numbers per 100,000 inhabitants. See the

[268] See also here the letter from IPO to state secretary Uslu on 13 December.

[269] There are numerous initiatives in this area, for example the various target group models (the Rotterdam Target Group Model or the Cultural Taste of Brabanders), 'Proeftuin Nieuw Publiek' in the Northern Netherlands or pleas for other approaches such as those of Van Eijck and Bisschop-Boele in Boekman 129, or Swinkels in Boekman 130.

[270] For this year, data are available for all indicators. For 2020 and 2021, data is missing for some indicators, or cannot yet be broken down to the provincial level.

Dashboard for the regional indicators of the other domains.
The maps in the Dashboard and in this section show part of the supply at provincial level for the Visual Arts, Audio-Visual, Literature, Performing Arts and Heritage domains. In absolute terms, the concentration of cultural supply over the years is highest in North Holland and South Holland. Among other things, South Holland has the largest number of bookstores and icons of modern architecture, while North Holland has the largest number of cinemas and movie theatres, museums, galleries and performance venues.[271] Given the large population and the presence of the three largest cities (Amsterdam, Rotterdam and The Hague), the high concentration of cultural attractions in these two provinces is not surprising (see the yellow box below for explanation).

Nevertheless, the cultural offer differs from province to province, and the provinces differ from each other in terms of domains. In terms of cultural heritage, in 2021 Friesland had almost as many protected town- and village views as South Holland (64 and 65 respectively).[272] The north-east of the Netherlands also has a relatively large number of archaeological national monuments: 197 in Friesland[273] and 215 in Groningen. In fact, Gelderland contains about half of the total number of archaeological national monuments in the Netherlands. The Archaeological Monument Map of the Cultural Heritage Agency (RCE) shows that in Gelderland, the high concentration of archaeological national monuments is mainly concentrated around the Veluwe. And even at the end of 2021, a complete and relatively intact Roman sanctuary was discovered in the province (RCE 2022).

Figure 1. **Total number of museums in 2020 (by province)**
Drenthe (21); Flevoland (44); Friesland (46); Gelderland (95); Groningen (25); Limburg (39); Noord-Brabant (65); Noord-Holland (125); Overijssel (45); Utrecht (44); Zeeland (23); Zuid- Holland (103)
Source: Statistics Netherlands (CBS)

Figure 2. **Total protected city-, town- and village views in 2021 (by province)**
Drenthe (31); Flevoland (1); Friesland (64); Gelderland (44); Groningen (47); Limburg (43); Noord-Brabant (42); Noord-Holland (51); Overijssel (21); Utrecht (45); Zeeland (19); Zuid-Holland (65)
Source: Cultural Heritage Agency of the Netherlands (RCE)

[271] Although the numbers of bookstore branches, icons of modern architecture and galleries concerns 2019, it is expected that 2020 and 2021 will have the same outcome given the level of supply compared to other provinces.
[272] Until 2018, Friesland even had the most protected town- and village views of any province. In contrast, the number in South Holland increased sharply over the last fifteen years (from 49 in 2007 to 65 in 2021), while Friesland remained fairly constant (from 62 in 2007 to 64 in 2021).
[273] This is one more than in 2019 and 2020, when Friesland had 196 archaeological national monuments.

The influence of Dutch cities

Due to the lack of structural and comparable data at the city level, it is not possible to zoom in further in the Culture Monitor. It is therefore important to note that the picture of a province is strongly influenced by cities with a large cultural infrastructure. Take Amsterdam, for example: in 2019, 88 percent of all galleries and 66 percent of the number of venues with a weekly programme in North Holland are located in the capital. And two-thirds of the performances and concerts in North Holland took place on stages in Amsterdam. The Culture Monitor AMA also shows that in 2019, more than 12,000 performances and concerts in Amsterdam attracted more than 5.5 million visitors: this was more than four times as many as in the other sub-regions of the metropolitan area combined. A similar effect can be seen in South Holland (with The Hague and Rotterdam), North Brabant (with Eindhoven and Tilburg) and the other provinces. Also view the Creative Industry Monitor for the top-10 Dutch cities and the development of jobs and companies in the Dutch creative industry.

Of the 906 public libraries[274] counted in the Netherlands in 2021, many are located in the provinces of South Holland (160), Gelderland (127) and North Brabant (120).

The Dashboard also makes it possible to convert the absolute numbers at provincial level into the number of inhabitants. We can see that in 2021 there were about eight libraries per 100,000 inhabitants in Zeeland, Groningen and Drenthe, while in North Holland and Flevoland there were four or fewer. Furthermore, the number of cinemas and movie theatres per inhabitant is highest in Zeeland, North Holland and Groningen, while South Holland and Flevoland have the fewest in relative terms.

Cultural offering per province

This visualization shows a selection of cultural provision indicators by province. On the Culture Monitor web page, tabs and toggles allow you to switch to numbers per 100,000 inhabitants. See the Dashboard for the regional indicators of the other domains.

Figure 1. **Number of cinemas and movie theatres in 2021 (by province)**
Drenthe (7); Flevoland (5); Friesland (11); Gelderland (36); Groningen (11); Limburg (18); Noord-Brabant (40); Noord- Holland (58); Overijssel (19); Utrecht (20); Zeeland (8); Zuid-Holland (46)
Source: NVBF

Figure 2. **Number of public libraries in 2021 (by province)**
Drenthe (43); Flevoland (13); Friesland (41); Gelderland (127); Groningen (45); Limburg (65); Noord-Brabant (120); Noord- Holland (115); Overijssel (82); Utrecht (64); Zeeland (31); Zuid-Holland (160)
Source: KB

[274] This only concerns branches and service points. A branch is defined by the National Library as 'a location where a collection is present and which is open with staff more than 15 hours per week'. A service point is 'a location that houses a collection and is open 5 to 15 hours a week with staff'. The total number of branches in the Netherlands has been declining for years. For this reason, the State Secretary wants to amend the Library Act, obliging all municipalities to offer a library facility. See also the Literature page.

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The Dashboard also includes more detailed figures on cultural offerings in the provinces, such as the number of staged arts performances, activities in public libraries or the number of film screens and seats. Bar charts and line graphs show the development of these over the years. By 2020, for example, we see a drastic decline in the number of staged arts performances in all provinces, the obvious explanation being the regulations to combat the coronavirus. In addition, the number of theatregoers in 2021 fell by 78 per cent compared to 2019, and, according to industry associations, pre-sales for the 22/23 season also struggled to get off the ground (Visser et al. 2022, Wensink 2022).

Development of performing arts performances
This visualization shows the development of the performing arts performances per province from 2018, 2019 and 2020. On the web page, one can click on a year at the bottom of the graphs to exclude a year from display. See the Dashboard for the development from 2005 onwards.

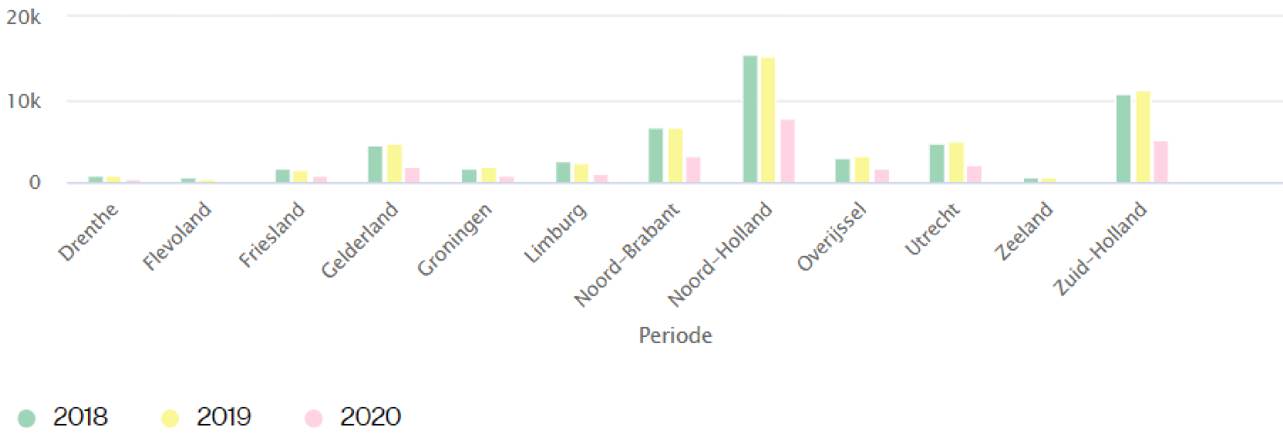

Figure 1. **Number of shows by professional performing arts (per province)**
[Period]
Source: CBS

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3. CULTURAL VISITS

The coronavirus pandemic has had a major impact on cultural visits. While in 2019 total visits to cinemas and movie theatres in the Netherlands increased by almost 65 per cent,[275] the pandemic led to a sharp decline in cinema visits in the following years. From 2019 to 2020, this decline was largest in Flevoland (-60.6 per cent) and smallest in Overijssel (-50.0 per cent). From 2020 to 2021, this trend was reversed: Flevoland was the only province where cinema visits increased slightly again (+1.3 per cent), while Overijssel experienced the sharpest fall (-21.0 per cent). Over the entire 2019-2021 period, the decline was around 60 to 61 per cent in almost every province, with a peak of 67 per cent in Zuid-Holland.

Attendance at province level

This visualization shows a selection of indicators on cultural visits by province. The tabs above the figure allow you to switch between cinema and museum visits. See the Dashboard for the regional visit figures of the other domains. While there are hardly any differences between the provinces in terms of film visits (over two years), the differences are more pronounced in other domains. In 2020, Dutch museums were visited approximately 14.4 million times, of which more than 8 million visits were to the 228 museums in North and South Holland. This means that 36 per cent of the total number of museums were responsible for more than half of the total number of museum visits. A similar distribution was observed in 2019. It is important to take into account the fact that a large proportion of the visits were by foreign tourists, especially in 2019 (Berg et al. 2022). As a result, we also see, for example, that the number of visits in North Holland fell more sharply than in, say, Drenthe or Zeeland. The decline therefore says less about the cultural visits of the residents of North and South Holland.

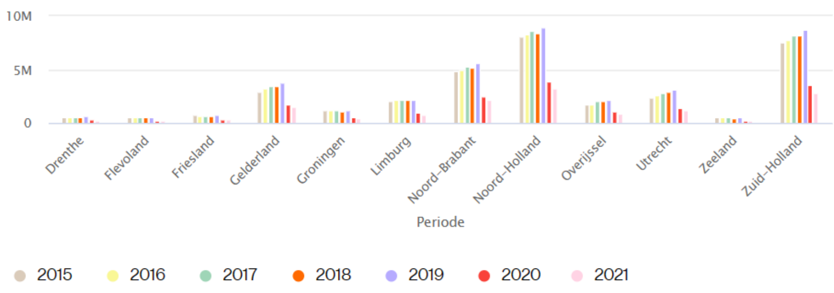

Figure 1. **Number of visits to cinemas and/or movie theatres (by province)**
Source: NVBF

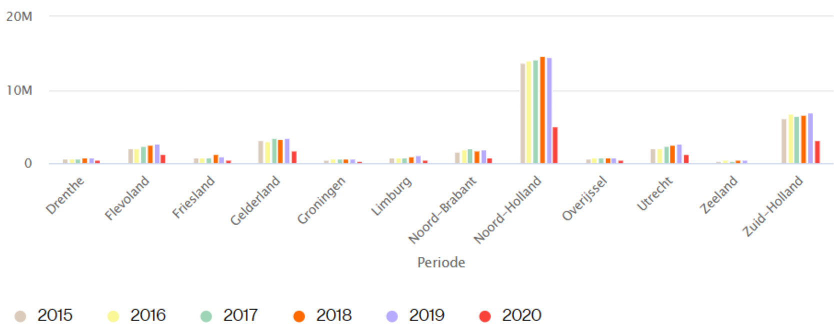

Figure 2. **Number of visits to museums (by province)**
Source: Statistics Netherlands (CBS)

[275] In North Brabant and Utrecht – where increases in both seats and film screens were the greatest – film attendance actually increased by over 96 per cent. See also the domain analysis for film in the Regional Culture Monitor, where this development is also compared with population growth in provinces.

On the basis of the figures in the Dashboard, however, more can be said about the visits of the inhabitants of a province concerning a domain such as Literature. For example, the share of library members in the population in 2021 ranged from 15 per cent in Limburg to 27 per cent in Flevoland. In Groningen, on the other hand, the library is by far the most frequently visited by residents on average. Zeeland, Limburg and Friesland have the lowest number of library visits, while the proportion of library members in Zeeland is relatively high (24 per cent). Per capita visits to the performing arts in 2020 were highest in North Holland and the province of Groningen. In the municipality of Groningen – despite coronavirus restrictions – as many as 85 per cent of residents reported having visited a cinema, theatre or museum at least once a month in 2020 (in 2018, this was 91 per cent.)[276]

Figure 1. **Number of public library members in 2021 by province**
Drenthe (108,435);
Flevoland (116,826);
Friesland (120,084);
Gelderland (452,643);
Groningen (124,196);
Limburg (163,305);
Noord-Brabant (487,962);
Noord-Holland (548,932);
Overijssel (263,721);
Utrecht (548,932);
Zeeland (93,214);
South Holland (659,555)

Sources: KB and CBS

Cultural visits per inhabitant

The following visualizations show data on cultural visits and consumption by province. On the website, you can see the relative numbers by enabling a *Per 100,000 Population* button.

Figure 2. **Number of visits to public libraries in 2021 by province**
Drenthe (743,207);
Flevoland (808,044);
Friesland (823,074);
Gelderland (4,011,527);
Groningen (2,263,505);
Limburg (1,450,194);
Noord-Brabant (4,222,550);
Noord-Holland (4,644,686);
Overijssel (2,274,978);
Utrecht (3,080,450);
Zeeland (397,464);
South Holland (6,576,386)

Sources: KB and CBS

[276] This is according to the Quality of Life survey conducted by OIS Groningen among residents aged 18 and above from the municipality of Groningen. It also shows an increase in visits to cultural centres and libraries between 2018 and 2020: from 31 to 46 per cent visiting monthly.

In order to understand who uses cultural services and why this differs per province, it is worth looking at the composition of the population in addition to the size of the population. Zeeland, Drenthe and Limburg, for example, have a relatively large number of residents aged over 50, while the provinces of Flevoland, Utrecht and Overijssel have a large number of young people aged up to 19 (see *Waar staat je provincie* [Where does your province stand] or Statistics Netherlands' Regional Key Figures). The 20-25 age group is largest in Groningen (1), South Holland (2) and Utrecht (3). National figures on leisure activities show that young people go to the cinema more than average (especially in the 12 to 19 age group, followed by the 20 to 34 age group). The 65+ group visits a relatively high number of 'canonical' performing arts and museums, and library visits are highest among the 12 to 19 and 35 to 49 age groups.

When we compare the number of cinema-goers with these demographic characteristics, it is noticeable that the three provinces with the lowest number of cinema-goers in 2021 (Friesland, Zeeland and Drenthe, with an average of 0.5 visits per inhabitant) also have a relatively high number of older people. The provinces with a relatively large number of younger inhabitants also tend to have higher cinema attendance,[277] especially Utrecht (0.9 visits), South Holland (0.8 visits) and Groningen (0.8 visits). The latter province also has the highest number of library visits in relative terms. Libraries are also frequently visited in Flevoland and Overijssel, where most young people aged 10 to 19 live. The Flevoland Cultural Monitor shows that local libraries are making special efforts to involve young people.[278] On behalf of the municipality of Almere, De Nieuwe Bibliotheek launched the website jonginalmere.nl: a website for and by young people (Vinkenburg et al. 2019).

Another factor that may play a role in the level of (cultural) attendance is the distance to cultural facilities. For example, the baseline measurement of the Zeeland Culture Monitor points to the relatively large distance between residents and cultural facilities as a possible explanation for the contrast between the rich cultural offer and the relatively low use of it. For example, while the average distance to a cinema in the Netherlands is just over 6 kilometres, the average distance in Zeeland is over 12 kilometres[279] (Broers et al. 2022). The report Cultuur in Gelderland. Een beknopte benchmark also shows that a large number of cinemas does not necessarily mean greater proximity to cinemas or increased attendance (Brom et al. 2020).

Figure 3. **Number of visits to performing arts shows in 2020 by province**
Drenthe (96,000); Flevoland (56,000); Friesland (155,000); Gelderland (444,000); Groningen (211.000); Limburg (231,000); Noord-Brabant (590,000); Noord-Holland (1,699,000); Overijssel (334,000); Utrecht (435,000); Zeeland (28,000); Zuid-Holland (1,102,000). Source: Statistics Netherlands (CBS)

[277] A major exception is Flevoland: the youngest province in the Netherlands also has the largest number of inhabitants under 19 years old, but the average Flevolander visited the cinema 0.5 times in 2020 (it was 1.4 times in 2019 while Utrecht counted 2.4 visits in the same year, for example). The lower number of visits in Flevoland could possibly be due to the great distances to cinemas, which are larger than elsewhere.
[278] See the Flevoland Culture Monitor 2017-2018 for more activities of cultural institutions.
[279] We also see this in other provinces like Friesland and Flevoland, where the distance to a cinema is even greater (see CBS Statline).

4. CASH FLOW

Public investment in arts and culture is also of interest: how does it relate to cultural provision and attendance in the province? This can be analysed by looking at both absolute and relative spending per inhabitant of a province. In absolute terms, Dutch municipalities spent a total of more than 2.1 billion euros on culture in 2021, and the provinces spent 325 million euros on culture (CBS 2022). The government spent 1.5 billion euros on culture in the same year (OCW 2022). Municipalities in South Holland, North Holland and North Brabant spent the most in 2021 (€520 million, €419 million and €270 million respectively), which is not surprising given that these provinces have the highest population numbers. The three provinces where the municipalities collectively spend the least on culture (between 36 and 43 million euros) are also the provinces with the lowest population numbers, namely Zeeland, Flevoland and Drenthe.

North Brabant, Gelderland and Limburg spend the most on culture in absolute terms (Table 1). Flevoland, North Holland and Overijssel spend the least on culture. Taken together, the provincial and municipal costs of culture produce a ranking that is again fairly

Table 1 - Municipal and provincial cultural costs in 2021, by province

Province	Number of inhabitants	Cultural costs municipality	Cultural costs province	Total cultural costs	Cultural costs per inhabitant
	N	x €1.000	x €1.000	x €1.000	€
Drenthe	494.771	42.498	20.181	62.679	127
Flevoland	428.226	43.388	7.951	51.339	120
Fryslân	651.435	55.227	39.115	94.342	145
Gelderland	2.096.603	187.724	42.960	230.684	110
Groningen	586.937	73.723	27.692	101.415	173
Limburg	1.115.872	124.261	42.651	166.912	150
Noord-Brabant	2.573.949	270.283	40.392	310.675	121
Noord-Holland	2.888.486	419.031	16.638	435.669	151
Overijssel	1.166.533	123.265	18.048	141.313	121
Utrecht	1.361.153	165.012	23.119	188.131	138
Zeeland	385.400	35.980	20.276	56.256	146
Zuid-Holland	3.726.050	520.459	26.466	546.925	147

Table 1. **Municipal and provincial cultural costs in 2021, by province**
Please note: numbers demarcated with periods instead of commas

consistent with population size. It is more revealing to look at how many euros local governments together spend on culture per inhabitant, as this varies widely: from 110 euros in Gelderland to 173 euros in Groningen.

Using the figures from the Dashboard, we can zoom in on municipal and provincial cultural spending by domain and see how it compares both with other subsectors and other provinces. For example, in 2021 – as in previous years – the largest share of municipal subsidies in the provinces went to the performing arts (around 30 per cent), with North Holland, Limburg and Utrecht at the top. Zeeland and Flevoland are the exceptions. Zeeland has the lowest cultural expenditure on the performing arts, at 18 euros per inhabitant (which is about 19 per cent of the total municipal contribution to culture). Flevoland also spends more on the visual arts than on the performing arts, but unlike Zeeland, this is likely due to the high municipal contribution to literature: 39 per cent of the total budget.

In addition to government funding from the municipalities and provinces, culture is also supported by the six national cultural funds.[280] In 2020, these accounted for almost 31 million euros reaching the cultural institutions of North Holland in the form of multi-year grants, by far the highest amount of any province.[281] In terms of the number of inhabitants, the government also invests by far the most in North Holland, namely 10.87 euros per inhabitant compared to an average investment of 3.33 euros per inhabitant.

State cultural funds and the BIS

The following visualizations show grants through the national cultural funds and the basic cultural infrastructure (BIS) by province. On the website, you can see the relative numbers by enabling a *Per 100,000 Population* button.

Figure 1. Figure 1. **Multi-year grants provided by the national cultural funds in 2019 (by province)**
Drenthe (491,000);
Flevoland (1,537,000);
Friesland (386,000);
Gelderland (2,373,000);
Groningen (1,822,000);
Limburg (2,055,000);
Noord-Brabant (2,846,000);
Noord-Holland (25,963,000);
Overijssel (2,373,000);
Utrecht (4,926,000);
Zeeland (779,000);
Zuid-Holland (9,513,000)

Source: OCW

[280] We only have the amounts provided through multi-year grants. Project subsidies from the national cultural funds therefore remain out of the picture.
[281] In 2019, this was 26 million, of which 25.1 million went to Amsterdam Metropolitan Area (AMA), of which 21.4 million went to the capital itself. For a more detailed overview, see the Amsterdam Metropolitan Area (AMA) Culture Monitor.

A number of cultural institutions are also directly subsidized by the government through the basic cultural infrastructure (BIS), which is set for a four-year period. In the 2017-2020 subsidy period, a total of 88 institutions[282] were awarded grants (Bussemaker 2016). Strikingly, the three smallest provinces (Zeeland, Flevoland and Drenthe) were not part of this basic infrastructure, while North Holland and South Holland received[283] €159 and 114 million respectively in 2020. As 2019 is part of the same BIS period, we logically see the same distribution. In North Holland alone, there were 26 BIS institutions in the Amsterdam Metropolitan Area during this period, including 23 in Amsterdam itself, which received[284] a total of €137.7 million in subsidies (see Amsterdam Metropolitan Area (AMA) Culture Monitor for more information). Although many of the institutions based here reach national and international audiences, the distribution of national funding remains a major concern. The current Basic Cultural Infrastructure 2021-2024[285] includes one museum from each province, such as the

Figure 2. **Multi-year BIS (basic cultural infrastructure) subsidies in 2020, incl. subsidies from the Heritage Act (by province)**
Drenthe (0);
Flevoland (0);
Friesland (3,983,342);
Gelderland (44,911,105);
Groningen (11,333,580);
Limburg (6,300,927);
Noord-Brabant (11,081,167);
Noord-Holland (158,555,900);
Overijssel (6,563,240);
Utrecht (18,268,829);
Zeeland (0);
Zuid-Holland (113,672,457)
Source: OCW

Figure 3. **Multi-year BIS (basic cultural infrastructure) subsidies in 2020, excl. subsidies from the Heritage Act (by province)**
Drenthe (0);
Flevoland (0);
Friesland (2,347,315);
Gelderland (15,194,316);
Groningen (11,333,580);
Limburg (6,300,927);
Noord-Brabant (11,081,167);
Noord-Holland (91,937,716);
Overijssel (-);
Utrecht (10,650,851);
Zeeland (0);
Zuid-Holland (27,590,392)
Source: OCW

[282] See the list of institutions that received a grant here.
[283] Including funds from the Heritage Act.
[284] Excluding funds from the Heritage Act.
[285] See the full list of institutions receiving BIS grants in 2021-2024.

Drents Museum, Kunstmuseum Flevoland and the Zeeland Museum Foundation.

For a more complete picture of the funding mix for culture, we can look at cultural institutions' own income. The Dashboard contains provincial figures on the self-generated income of public libraries, cinemas and movie theatres, museums and performing arts venues. These figures are also available for 2020 and, in some cases, 2021.

5. WHAT NEXT?

The data collected for the Regional Culture Monitor clearly shows provincial differences and profiles. However, the non-subsidized cultural infrastructure in the region is only mapped to a limited extent. As a follow-up, it would be desirable to explore how this can be made more visible. The fact that some institutions, creatives and cultural activities are not measured (in a comparable way) does not diminish their importance for cultural life in the province.

However, knowledge of and about this infrastructure is mainly at the local or regional level. The monitors set up by the provinces themselves often do a good job of mapping the cultural landscape both broadly and more specifically. *Waarde van Cultuur Brabant [Value of Culture Brabant]*, for example, mapped 707 subsidized and unsubsidized cultural sites in the five large and seven medium-sized cities in North Brabant using online information sources. Associated social media registrations (Facebook, Instagram and Twitter) were then used to see how many and which cultural activities people visit, which are currently often left out of monitors. Mapping these unsubsidized organizations was therefore the primary objective.

Municipal officials also tend to have a better understanding of the smaller and informal cultural institutions and activities in their area. In order to zoom in geographically, cooperation with those closer to the ground is necessary. By aligning the different provincial monitors, municipalities can be better connected to ensure better comparability of geographical data in the future. It is also desirable to be able to zoom in at the municipal level in the future.

6. OVERVIEW OF REGIONAL CULTURE MONITORS

Below is an overview of the partial assessments by province in the Regional Culture Monitor and other available monitors. Is there a monitor missing from this overview? If so, we would like to hear from you!

Drenthe

- Analyse Regionale Cultuurmonitor
- Cultuurmonitor Drenthe 2017-2020 Editie 4. Published November 2021
- Cultuurmonitor Drenthe 2017-2020 Editie 3. Published January 2021

Flevoland

- Analyse Regionale Cultuurmonitor
- Cultuurmonitor Flevoland 2017-2018: eerste helft beleidsperiode 2017-2020. Published 2019

Friesland

- Analyse Regionale Cultuurmonitor
- Nulmjitting Kultuermonitor Fryslân. Published 2023
- The Fries Sociaal Planbureau has some figures on cultural participation in 2019. See the January 2020 publication here.

Gelderland

- Cultuurmonitor Gelderland
- Analyse Regionale Cultuurmonitor
- Cultuur in Gelderland: een beknopte benchmark
- Gelderland Erfgoedmonitor. Published 2020

Groningen

- Analysis Regional Culture Monitor
- Basic Groningen Municipal Monitor contains some data on culture. See, for example, Cultuurparticipatie. Published 2021

Limburg

- Analysis Regional Culture Monitor

Noord-Brabant

- Analyse Regionale Cultuurmonitor
- Waarde van Cultuur Brabant 2022. Published 2022
- Waarde van Cultuur Brabant 2020. Published 2020

Noord-Holland

- Analyse Regionale Cultuurmonitor
- Cultuurmonitor Metropoolregio Amsterdam (MRA). Published 2021

Overijssel

- Analyse Regionale Cultuurmonitor

Utrecht

- Analyse Regionale Cultuurmonitor
- Utrecht Monitor for the city, including insights into cultuurdeelname [cultural participation], culturele anbod [cultural supply], and tevredenheid culturele voorzieningen [satisfaction with cultural facilities]. Figures for 2021

Zeeland

- Analyse Regionale Cultuurmonitor
- Cultuurmonitor Zeeland: Nulmeting. Published 2022

Zuid-Holland

- Analyse Regionale Cultuurmonitor
- Cultureel Zuid-Holland in Kaart
- Zuid-Hollandse erfgoedvrijwilligers in beeld. Published 2022

7. WANT TO KNOW MORE ABOUT CULTURE IN THE REGIONS?

Want to know more about the theme Culture in the Regions? Click on the following link for a list of available literature in the Boekman Foundation's Knowledge Bank.

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THEME: CULTURE AND PARTICIPATION

This theme page shows trends in attendance and practice and is an invitation to explore more culture statistics on the Culture Monitor Dashboard. How are theatres, museums and other venues being visited? What are the trends in practice? And what does decreasing purchasing power mean for cultural participation?

Written by
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Last update: 26 January 2023

Oerol, 2022 / Photography: Lisa Maatjens

SUMMARY

After the effects of the pandemic on cultural participation over the past three years, the energy and housing crisis, rising inflation and a decline in purchasing power are now affecting participation rates. The 'old' audiences do not seem to be finding their way back to cultural institutions easily, and the sector is concerned about the future. While big names attract huge audiences, venues for lesser-known artists remain empty. Yet people did not sit still during the pandemic – they read more books and played more games, streaming was rampant and video-on-demand flourished. There has even been a slight increase in cultural practice, although this mainly applied to more individualistic hobbies.

1. INTRODUCTION TO THE THEME AND ITS IMPORTANCE

Cultural participation has been severely affected by the pandemic. Looking at the figures for 2021 and the forecasts for 2022, it is clear that the cultural and creative sector has not yet recovered and that the pandemic is likely continue to affect the sector for a long time to come. Forms of cultural participation that take place on site or in the company of others have been particularly hard hit. In 2021, museum visits fell below the level of 2020, theatre audiences fell by 78 per cent compared to 2019, and the presale of the 2022/23 season also got off to a slow start (Visser et al. 2022, Wensink 2022). Although the total number of practitioners in the Netherlands increased slightly during the pandemic, the total number of people who practice culture together – either in informal groups or as members of an association – decreased. Cultural practice became more individual and less group-based (Neele et al. 2021a). At the same time, the use of digital media in consumption and practice increased, especially among young people (Broek 2021, Neele et al. 2021a).

Although the pandemic has had a major impact on the cultural and creative sector up to now and probably for years to come, it is now clear that we are talking about multiple crises. Rising energy prices and persistent inflation are squeezing purchasing power. The Bureau for Economic Policy Analysis (CPB) notes that the disposable income of Dutch households is falling. People on low incomes are particularly vulnerable to rising prices (Rijksoverheid 2022). This may also have an impact on the level of cultural participation. The cultural participation survey Vrijetijdsomnibus (VTO)[286] shows that people with a low family income participate less in culture than people with an average or high family income. Continued pressure on purchasing power may exacerbate these social differences. Jeugdfonds Sport en Cultuur [The Youth Fund for Sport and Culture] fears that parents will cut back on sports clubs, music, dance and culture for children and young people because of growing financial worries (Maks 2022). And poverty is expected to increase further.

[286] The 'Leisure Omnibus'(VTO) is a survey of the leisure activities of Dutch people, carried out by Statistics Netherlands and the Boekman Foundation at the request of the Ministry of Education, Culture and Science. Comparable research is being done for the sports sector. The Mulier Institute reports on this. Figures from 2020 can be found in the 2021 Annual Report of the Culture Monitor.

In this chapter we discuss trends in cultural practitioners and participants using data[287] from the database. We complement this with data on the consumption and practice of digital culture. We also consider the impact of purchasing power on cultural participation, looking back at the 2008 financial crisis and pandemic, and the impact of the current cost of living, housing and energy crises on cultural participation.

2. KEY CULTURAL PARTICIPATION FIGURES

In 2022, the Amsterdam Dance Event (ADE) attracted a record number of visitors, more than in 2019 – the last edition before the pandemic (nu.nl 2022). Meanwhile, the Noorderzon festival in Groningen almost recovered its pre-coronavirus level. The Coldplay concert in the Johan Cruijff ArenA sold out in no time (Wijk 2022), even though the cheapest tickets cost no less than 60 euros. This was in stark contrast to the disappointing ticket sales for concerts by lesser-known artists, especially in the smaller and medium-sized pop venues. PopLive's research shows a winner-takes-all effect, with money being spent mainly on major artists (see below in more detail under 'Other current crises'). This trend is also evident in the theatre world. The theatre and concert hall directors' association VSCD notes that it is mainly lesser known names and less popular genres that are struggling (NOS Nieuws 2022a).

Looking at the figures in the Culture Monitor Dashboard, we see a decline in cultural visits across the board between 2019 and 2021. Nowhere are cultural visits back to pre-pandemic levels. The overall proportion of people visiting culture has fallen from 94 per cent in 2018 to 84 per cent in 2020 (VTO 2020). We see a bigger drop in participation in cultural heritage: where previously two-thirds of the Dutch population visited something related to heritage in their leisure time, this dropped to less than half in 2020 during the pandemic (Ibid.). The impact is still greatest in the performing arts, as can also be seen from the sharp decline in audience revenues, especially for independent producers (see also the Theatre domain chapter). Music venues saw a drop of 76 per cent in the number of performances in 2020 (Dee et al. 2021).

Consumption (including visits)

The visualizations on the next page show the evolution of cultural consumption and the drastic decrease in the different domains after the pandemic.

Figures from the VSCD[288] show that, in 2021, theatre attendance fell by 78 per cent compared to 2019, while the number of performances fell by 60 per cent. While these figures are not surprising given the measures taken to contain the coronavirus at the time (including seven months of complete theatre closures), they do raise concerns for the future. For example, members of the VSCD reported that 2022 also had a slow start and that pre-sales for the 2022/2023 season were still far from pre-pandemic levels (Wensink 2022). There are therefore serious concerns about audience reticence. Research by the Nationaal Theaterfonds indicated that this hesitation was mainly due to the lack of clarity about whether the concerts and performances would actually take place (Beerda 2022).

[287] The data comes from the VTO, Statistics Netherlands' Statline, other knowledge institutes (such as the LKCA's Monitor Amateurkunst for cultural practice) and industry and professional organizations (including the Museum Association, VSCD, NAPK, VNPF, KVB Boekwerk, NVBF, and others).
[288] Nationwide, the VSCD has 151 members (theatres and concert venues).

While health risks were more likely to be a factor for older people, costs were particularly important for younger people.

The forecast for museums in 2022 also looked bleak. The Museums Association warned that smaller, municipal and private museums in particular would struggle (NOS Nieuws 2022b). In 2021, the number of museum visits fell below the level of 2020, from 13 to 11 million visits. This is less than a third of the number of museum visits in 2019 (Visser et al. 2022).

In the practice of art and culture, we initially see a positive development. The Amateur Art Monitor (MAK) of the Centre of Expertise for Cultural Education and Amateur Arts (LKCA), mentions a slight increase[289] in the proportion of arts practitioners in 2021 (Neele et al. 2021a). This increase is particularly evident in the practice of 'individual' activities and is accompanied by a decrease in social activities. As an explanation for the increase in individual activities, in addition to the possibility of home practice the researchers cite access to online tools and platforms for

Figure 1. **Public library visits and loans**
[Numbers of visits to public libraries; Number of physical loans from public libraries; Number of e-book loans from national digital public library]
Sources: KB, NVBF, Boekman, OCW and CBS

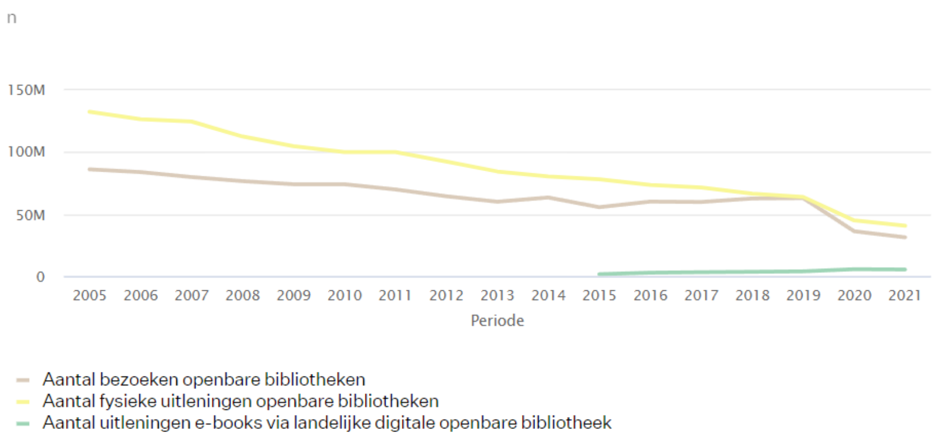
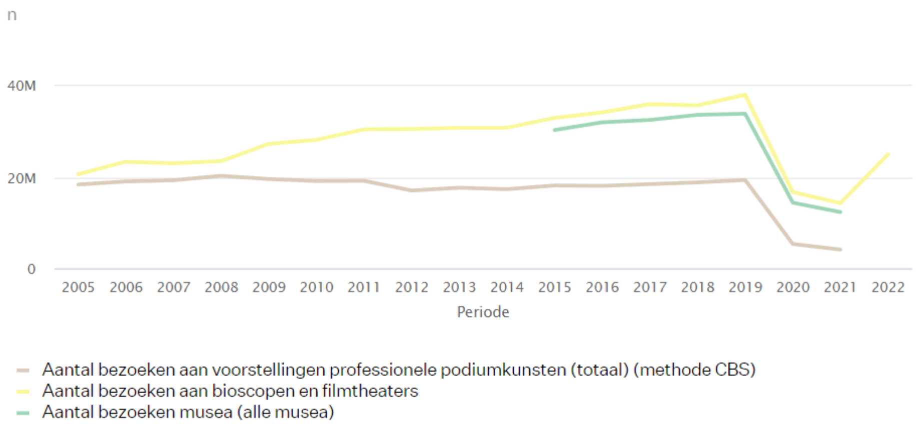


Figure 2. **Visits to museums, theatres and cinemas**
[Number of visits to performances of the professional performing arts (CBS method); Number of visits to cinemas and movie theatres; Number of visits to museums (all museums)
Sources: KB, NVBF, Boekman, OCW and CBS



[289] According to MAK, 43 per cent of the Dutch population aged 6 and older practised one or more artistic or creative activities in their leisure time in 2021. That this percentage is lower than the VTO's (61 per cent) may be due to several reasons. The type of activities asked for differs. If we compare arts practitioners from the VTO with MAK, the figures are closer together. In addition, MAK measures from 6 years and older, the VTO from 12 years and older.

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learning, meeting and showing work (Ibid.). The decrease in social activities is also reflected in a drastic decrease in members and volunteers, as reported by the choral network Koornetwerk Nederland and Statistics Netherlands (Koornetwerk Nederland 2021, CBS statistiek Musea,[290] Neele et al. 2021b). Performing arts often include social activities such as acting or singing in choirs, which are more difficult to do from home. We see a similar decline in the number of volunteers in museums and the performing arts (see the figures in the Dashboard). From the perspective that it is important to create culture together, Secretary of State Gunay Uslu is investing one million euros in 2023 to support amateur art through the Nationaal Akkord Amateurkunst [National Agreement on Amateur Art],[291] and three million euros in the following years (Uslu 2022a).

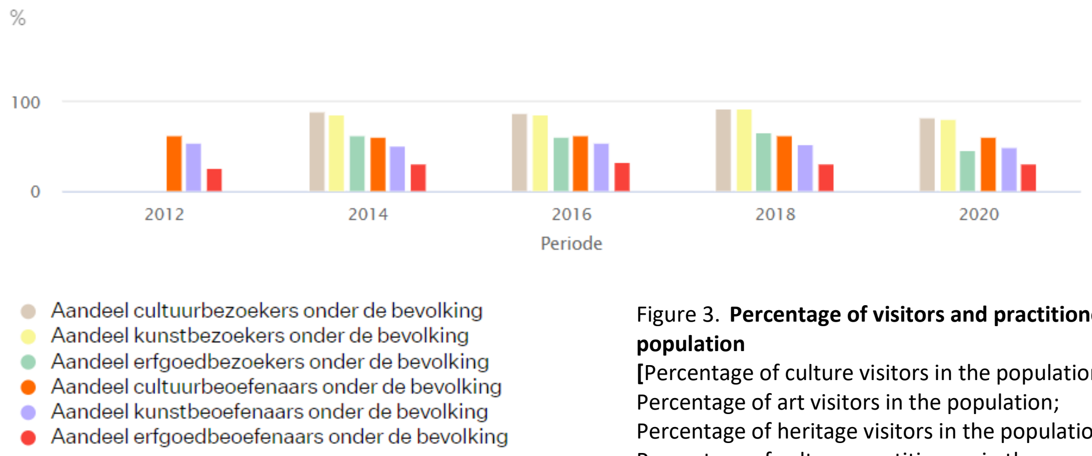

Figure 3. **Percentage of visitors and practitioners in the Dutch population**
[Percentage of culture visitors in the population;
Percentage of art visitors in the population;
Percentage of heritage visitors in the population;
Percentage of culture practitioners in the population;
Percentage of art practitioners in the population;
Percentage of heritage practitioners in the population]
Sources: KB, NVBF, Boekman, OCW and CBS

3. MORE DIGITAL CULTURAL OFFERINGS

As an alternative to physical cultural outreach, more digital cultural offerings rapidly emerged in 2020, with a variety of opportunities to reach new audiences, including cross-border ones. These initiatives included virtual museum tours, online recordings of theatre performances and digital reading clubs (see also the overview of online cultural initiatives). But the general digitization of cultural services also continued.
Already in 2018, for the first time, the total turnover of streaming services in the Netherlands was higher than the gross revenues of Dutch cinemas, respectively 324 versus 312 million euros. And where cinema attendance and turnover fell drastically during the pandemic, the video-on-demand (VOD) platforms experienced an unprecedented increase in turnover (read more about this on the Audio-Visual domain page in the section *Momentum in streaming-land*). The growth in revenues was also strongly reflected in the Dutch music industry (NVPI), where streaming services[292] accounted

[290] See the source here.
[291] The state secretary is committed to a national amateur arts agreement, with agreements between OCW, IPO and VNG on a structural, coherent approach to supporting amateur art groups.
[292] Spotify, SoundCloud, Apple Music, Deezer, Tidal and YouTube.

for no less than 80 per cent of revenues in 2021 (more about this in the Music domain chapter). While the number of physical visits to concerts decreased, digital consumption increased even more. We saw a similar development in the games industry. In May and June 2020, Dutch consumers spent 42 per cent more on games than in the previous year. Over whole year, consumer spending increased by a further 20 per cent (Jaeger et al. 2020, Schipper 2020, Uffelen 2020). Social games, which are played online with friends, experienced particularly strong growth (read more about this on the Games domain section on the *Impact of the pandemic*).

Organizations that rely mainly on physical visits and on-site offerings – such as theatres – have also begun to experiment with new options for online and digital presentations. This digital transformation is not new, but the pandemic has given it a strong impetus. Online programming has become an integral part of the organizational strategy[293] of many cultural institutions (Knol 2021, see also the Theatre domain chapter). But these digital possibilities have only partially compensated for the loss of audience reach. This is also evident in the Literature domain: the number of e-books and audiobooks lent increased between 2019 and 2021, but could not compensate for the reduction in physical books (see the Literature domain chapter). Similarly, in practice, despite an increase in the use of online platforms and tools,[294] there was a general decrease in the proportion of practitioners who attended classes, courses or workshops during the pandemic in 2020 compared to 2017 (Neele et al. 2021, see also the LKCA's Amateur Art Monitor).

Nevertheless, there are also hopeful signs: research by the Dutch Cultural Heritage Agency (RCE) on participation in cultural heritage shows that the social value of participation does not necessarily disappear with the introduction of digital forms. For example, young people seemed to participate more actively when digital technologies and experiences were used (Burggraaff et al. 2022). In addition, digital participation can lower barriers to physical participation (Ibid.).

Other current crises

It is clear from the figures presented above that the corona pandemic has had a major impact on cultural participation. However, for the future of the sector it is important not only to examine the (lasting) effects of the pandemic, but also to keep an eye on other current crises – for example, the cost of living crisis (caused by high inflation and the resulting loss of purchasing power), the energy crisis and the housing crisis. All of these have an impact on spending patterns and therefore on cultural participation. Below, we look at the impact of these current crises on cultural participation.

The fact that the public is becoming increasingly reluctant to spend money – including on the cultural sector – is a trend that is more widely apparent. In September

[293] Nevertheless, after the pandemic many institutions largely shifted their focus to physical programming.
[294] Both for training and for showing work.

and October 2022, Statistics Netherlands reported on historically low consumer confidence (-59): consumers are not only negative about the economic situation, but also about their own financial situation.[295] In particular, the propensity to buy was much lower in October 2022 than in previous periods of low confidence (CBS 2022a). And although people spent more money on culture in the second and third quarters of 2022 than the previous year[296] (CBS 2022b, CBS 2022c, CBS 2022d), these figures give a distorted picture of the sector's recovery. The growth in 2022 was partly due to the fact that consumption was low in 2020 and 2021, when cultural institutions were closed for much of the year.

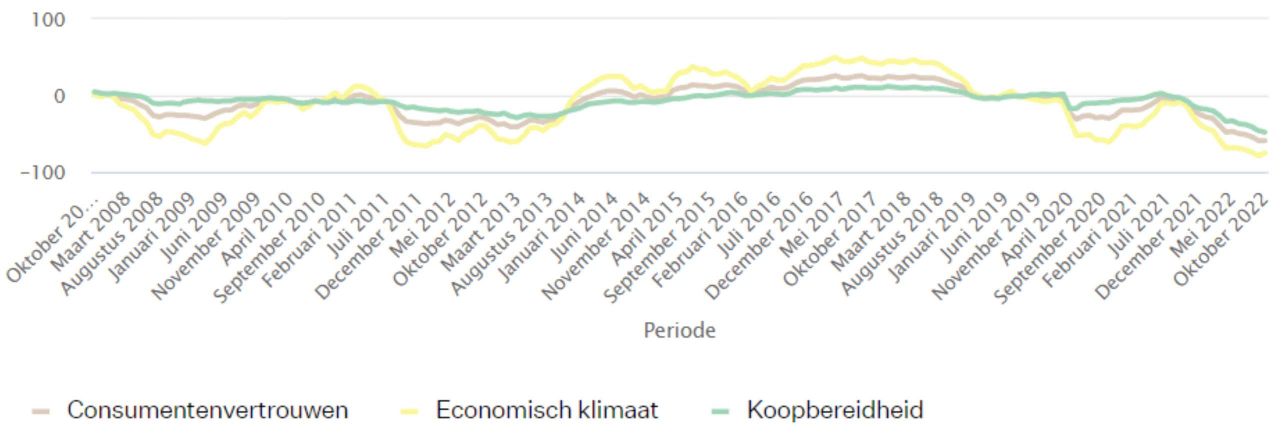

Figure 1. **Consumer confidence and propensity to buy, 2007-2022**
Average of all sub-questions
[Consumer confidence; Economic climate; Propensity to buy]
Source: Statistics Netherlands (CBS)

Economic figures
The visualization on this and the next two pages show the Statistics Netherlands figures on (confidence in) the Dutch economy.

In 2022, the sector felt uncertain about the future, as interviews with the NOS, NRC, AD and others show. Research conducted by the Nationaal Theaterfonds [National Theatre Fund] shows that three-quarters of theatregoers now attend fewer performances than before the crisis (Beerda 2022). It is difficult for amateur arts organizations to find sufficient organizational power at board level in order to revive their membership base (Neelemans-Wouters 2022, Uslu 2022a). Recent research[297] in the Flanders region of Belgium also shows that the participation rate was expected to recover only slightly in 2022, and remain far below the level of 2019 for the time being (Kenniscentrum Cultuur- en Mediaparticipatie 2022).
Another question is how sustainable the growth in consumer spending is, as the figures from Statistics Netherlands show. After all, the growth of the cultural sector as a whole does not mean that individual cultural

[295] Consumer confidence is based on the Consumer Business Cycle Research survey and is compiled from the weighted average of the sub-indicators economic climate and propensity to buy. Read the article here.
[296] Consumers mainly spent more on hospitality, culture and recreation. Statistics Netherlands reports that the value of the culture, sports, recreation and other services grew substantially; by over 40 per cent in the second quarter of 2022 compared to 2021, and by over 22 per cent in the third quarter.
[297] Read more about the research conducted in Flanders here.

organizations are all doing well. Large successful players can 'make up' for the losses in the overall picture. Berend Schans, chairman of the VNPF, the association of Dutch pop venues and festivals, notes that audiences are particularly avoiding new artistic offerings (Quekel 2022). The bigger names in the sector seem to be less affected by disappointing attendance figures. Well-known pop artists, for example, have attracted full houses and the larger pop festivals were sold out in 2022.

One possible explanation for this may lie in the 'superstar economy' or 'winner-takes-all' theory. The American economist Alan Krueger found that in recent decades an increasing share of live music revenues has gone to a very small (top) tier[298] of artists (Krueger 2005, Krueger 2019). There is also a superstar economy in the Netherlands, researchers from PopLive conclude. Because of the algorithms that underpin music streaming, the power of social media and the way the live music industry works, the superstar effect is now amplified (PopLive 2022). This makes it difficult for smaller and lesser known names to find an audience.

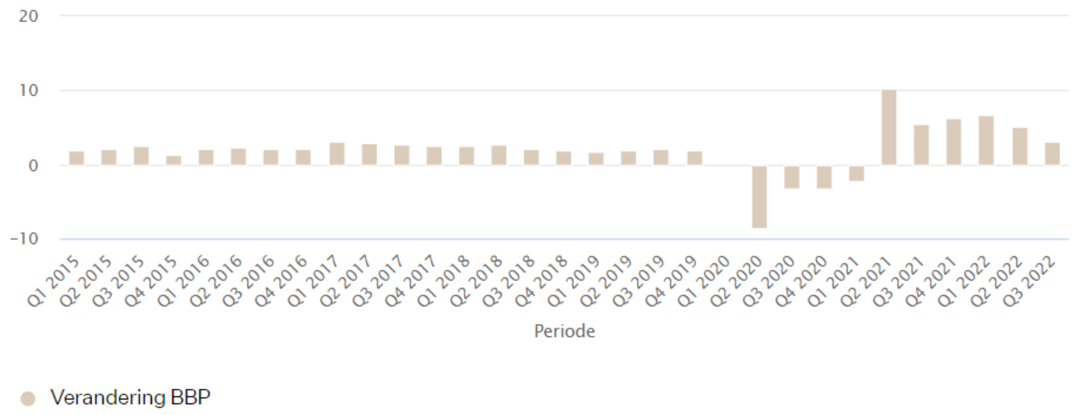

Figure 2. **GDP, 2015-2022**
% change in GDP compared to previous year
Source: Statistics Netherlands (CBS)

Ultimately, a decline on the demand has side affects on the supply side, and vice versa. For example, a lack of visitors can lead to a reduction in supply, as institutions get into financial difficulties due to a lack of income from audiences. The Museumvereniging [Museum Association] describes a similar downward spiral when supply has to be reduced (Vakblad Fondsenwerving 2022). In recent years, the various support measures of the Rijkscultuurfondsen [National Cultural Funds] have mainly focused on supply, but to a much lesser extent on stimulating demand (Brom and Schrijen 2021, Gielen et al. 2022). The policy review on cultural participation[299] concludes that the programmes to promote reading (especially for children) and the library facilities for the disabled are in fact the only instruments that focus directly on cultural participation (Gielen et al. 2022). Attention to restoring cultural infrastructure is important, but it is also important to think about restoring cultural participation

[298] Krueger concluded that in 2017, the top 1 per cent of US pop artists accounted for 60 per cent of all live revenues. The top 5 per cent took 85 per cent of all revenues.
[299] The policy review is a periodic evaluation of the cultural participation component and the role of the Ministry of Education, Culture and Science. It concerns the time period 2001 up to and including 2020. The audit was carried out by Significant APE and Dialogic. Read the full report here.

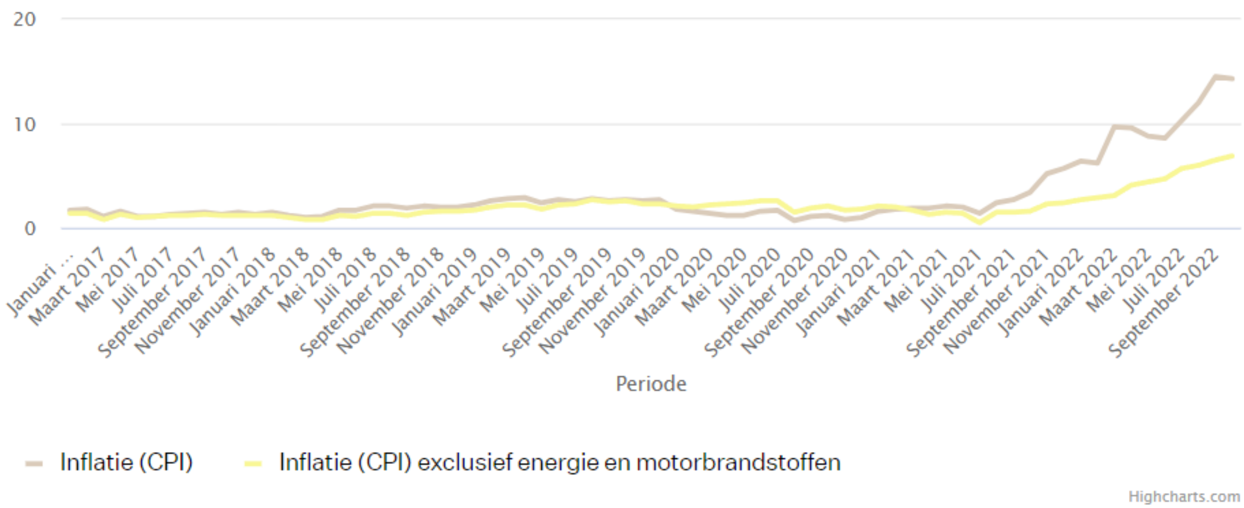

Figure 3. **Inflation, 2017-2022**
% change compared to previous year
[Inflation (CPI); Inflation (CPI) excl. energy and petrol]
Source: Statistics Netherlands (CBS)

Future Perspective

Where do we go from here? What can we learn from the successive crises? During the 2008 financial crisis, people were still positive about the future and the resilience of the cultural and creative sector. The Netherlands Institute for Social Research (SCP), for example, wrote that no major changes in cultural attendance was discernible in the 2010s, except for a growing reach within various disciplines. "The credit crisis and its aftermath, including cuts in subsidized culture, do not seem to have left any traces in the cultural field. Not even in terms of visitor numbers" (Broek 2021). Art economist Van Klink also concluded in 2009 that the impact of the credit crisis posed "no threat at all" to subsidized institutions (Klink 2009). He made the important observation that cultural entrepreneurs who do not receive long-term subsidies and who therefore earn their income from the market are less crisis-resistant.

Although in many ways the effects of the credit crisis cannot be compared to the current crises,[300] there are similarities that may have prepared us for the current situation. The report *Ongelijk getroffen, ongelijk gesteund* *[Unequally Affected, Unequally Supported]* shows that in 2020, just as Klink observed in 2009, it was organizations without multi-year subsidies[301] which experience the biggest drop in income and turnover. Despite the support measures, these organizations suffered large losses in 2020, while most organizations with multi-year subsidies ended the year without a loss (Goudriaan et al. 2021). This affects not only the supply, but also participation rates.

In addition, after the 2008 financial crisis, just as during the pandemic, the digital availability of forms of cultural expression increased (Broek 2021), which the public could often use for free or at low cost. In the wake of the 2008 crisis, however, this development did not go hand in hand with a reduced physical

[300] There were, for example, no lockdowns in 2008.
[301] Such as pop music venues and independent theatre producers.

reach of culture. “The consequences were limited to slight shifts in the scope of cultural media use, with the importance of digital media growing at the expense of print media and broadcasting” (Broek 2021).

Unfortunately, this was not the case during the pandemic, when cultural institutions had to close their doors completely or partially for several time periods, hindering the physical reach of culture. In its report on the impact of the pandemic on the cultural sector, the Netherlands Institute for Social Research therefore concludes that the increase in digital consumption at home – such as films or stage performances via streaming services, or virtual tours of museums – may lead to a decrease in the need for physical visits (Broek 2020). This trend was already visible in certain sectors even before the corona crisis.

It is therefore important to maintain the innovation that emerges or accelerates during a crisis. During both the credit crunch and the current crisis, there was a lot of innovation: organizations found new ways to engage audiences and generate income. In 2008, for example, music lovers were able buy shares in their favourite band thanks to online music platforms such as Sellaband, Bandstocks, Magnatune and MyMajorCompany (Hartog 2009). And in the autumn of 2009, the magazine *Museumpeil [Museum level]* published a special issue called *Crisis als kans! [Crisis as an opportunity!]* about how museums can sharpen their creativity and ingenuity in times of crisis. In 2020-2022 the search for alternative income models has also proved necessary to make the cultural and creative sector more resilient and accessible to the public. Based on the figures above, we expect that this will continue to be necessary in the coming years. State Secretary Uslu earmarked 135 million euros for this purpose in 2022, divided over the following topics: measures to revive the sector; the labor market; starting a flow of orders for producers; promoting youth culture; and innovation and digitization in the sector (Uslu 2022b). In November 2022 the multi-year paper *De kracht van creativiteit [The power of creativity]* allocated 170 million euros in additional funding for culture from the coalition agreement. Here the State Secretary focused on cultural and creative professionals, creativity in complex social challenges, accessibility of culture, digitization and innovation, and heritage for the future (Uslu 2022a).

It is important to make investments in digitization sustainable, so that they continue to exist after the crises. The State Secretary also emphasized that the ‘digital wheel’ is regularly reinvented for various reasons. She wants to support the sector in the coming period by stimulating the joint development of knowledge in this area and by investing in infrastructure and innovation. “Digital transformation makes the sector stronger and more flexible”, and better prepared for any subsequent crises (Uslu 2022b).

6. WANT TO KNOW MORE ABOUT CULTURE AND PARTICIPATION?

See more data on the theme of Culture and Participation in the Culture Monitor Dashboard.

Figures on cultural participation derived from the VTO can be found in the Jaarrapportage [Annual Report] 2021.

Would you like to read more about culture and participation? Click on the link below for a list of available literature in the Boekman Foundation's Knowledge Bank.

An earlier version of the text on this theme page can be found here (Dutch only).

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The Boekman Foundation's researchers continuously gather data and insights on the various domains and themes. They do this together and in consultation with stakeholders and experts from the sector, who feed the Monitor with indispensable and in-depth knowledge and information.

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ACCESSIBILITY

As the Boekman Foundation, we believe it is important that the Culture Monitor is accessible and usable for everyone. In 2022, we therefore had this website checked for accessibility for people with a visual impairment. As a result, Van Ons made a number of adjustments to improve accessibility for users with screen readers. In the future we will also continue to see where improvements can be made.

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