**ERASMUS UNIVERSITY ROTTERDAM**

# Effects of economic crisis on theatre programming

## Cultural Economics and Cultural Entrepreneurship

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**August 2012**

## Preface

What lies here before you, is the final result of my master Cultural Economics and Cultural Entrepreneurship at Erasmus University Rotterdam. The cultural sector in the Netherlands is currently undergoing large changes, which will be centralized in this thesis, with the performing arts in particular. Through this way, I would like to take the opportunity to thank several people who have contributed to this result. First and foremost, I would like to thank my thesis supervisor, prof. dr. Cees Langeveld for guiding me throughout this process, especially through struggles I found myself in. Secondly, my gratitude goes out to my second reader, dhr Frans Brouwer, who has given many suggestions in order to improve my thesis. Thirdly, I would like to thank the selected theatres for providing me with the necessary information. Who to thank fourthly and finally are my parents, who have given me all the possible support and help and have put up with my frustrated tantrums.

To you all I say: thank you!

Nikki Koppies

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# 1. INTRODUCTION

The careless cricket
Sang the summer away
Just to find herself
Poor and with nothing to eat
No fly, no bread
In the winter to have.

Hungry and whining
To the ant she went
Begging for something to have
Just out of kind heart
As to be able to eat
Till the good season comes:
Swearing by her faith
Next August she would refund
With interests and capital sum.

The frugal ant, who double thinks
Before anything she lends
-"How did you spend your summer away?"
Thus asks straight out.
And the cricket:-"My dear friend,
I did nothing but sang day and night"-
"Well done, my dear friend,
Now you can also dance"

Jean de la Fontaine (1621-1695) – The Ant and the Cricket 1668

The fable above is one of the most famous fables by seventeenth century Parisian poet, Jean de la Fontaine. The cricket generating entertainment for the ant, with the ant refusing the cricket recognition by any form or sort of support, but even trying to provoke the cricket in doing more. What de la Fontaine attempted to get across with this particular fable is his critique towards the French government at that time due to their negative attitude towards artists with refusal to support them.

Apparently, some things just don't change. To this day, artists and government don't appear to agree all that well. Struggles, arguments and protest with or against the government aren't unfamiliar. Some are about artistic freedom, but most of them are about money. That is, the lack thereof. Today maybe even more so than ever before, governmental support for the arts is shrinking to great extent. The effects of this decrease in governmental financing will be centralized in this research.

## 1.1. General

### *1.1.1. The credit crunch from a bird's eye view*

In the year of 2007, the economic crisis started in the United States of America, due to the collapse of the housing market, which resulted in the fact that many people couldn't afford their mortgage any longer and filed for bankruptcy. In an attempt to limit the effects of the collapse any further, the American government decides to nationalize two of the biggest mortgage banks in the United States of America, which led the crisis even further in depth. This, because the stocks on Wall Street dropped with 416 points on September 27th[1], such a drop hadn't occurred since September 11 2001. As a result, investors lost confidence in the market, which caused the stocks to get in a free fall, with a drop on Wall Street of 778 points on September 29th in 2008[2].

Not long after the emergence of the economic crisis in the United States it became clear that this crisis would become a phenomenon of a global nature, due to the strong international relation of financial markets. Banks in Europe and parts of Asia face difficulties as well and the stock markets take a similar dive as in the United States. Besides banks, the business sector also suffers greatly. Due to the lack of trust and confidence in the economy, businesses have difficulties in obtaining credit from banks and results in a downward economic spiral. Which started as a credit crisis in 2007, has now expanded to a global large scale economic crisis. When the economy slowly started to become healthier by the year of 2011, a different type of crisis emerged in Greece: a depth crisis.

Besides an obvious effects on the global economy in general, the credit crunch has also been having a significant cross national impact on the arts. Examples are numerous in the cultural sector. Therefore, some examples will follow. November 12th, 2008. A contemporary art auction at Sotheby's New York raised $113.6m, a disappointing half of the low estimate. These estimates had been made in the spring of 2008, which was before the crisis had deepened. At the time of the auction, prices were considered being too high for the works of art, leaving a third of the 75 pieces of art rejected[3]. December 20th, 2010. As Greece continues to suffer from the economic crisis, the inaugural Athens World Fine Art Fair, planned for 20-23 May at the Zappeion Palace has been cancelled. In June, fair organisers, the Geneva-based Art Culture Studio, had already postponed the Old Masters, jewellery and contemporary art event from November 2010 to May.[4] April 16th, 2011. Established in 1900 and one of the 'Big Five' American biggest orchestras, the Philadelphia Orchestra files for bankruptcy, the so called Chapter 11 bankruptcy.

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1 http://money.cnn.com/2007/02/27/markets/markets_0630/index.htm
2 http://www.time.com/time/specials/packages/article/0,28804,1845523_1845619_1845561,00.html
3 http://www.guardian.co.uk/business/2008/nov/13/christie-s-art-recession
4 http://www.theartnewspaper.com/articles/Athens%20World%20Fine%20Art%20Fair%20cancelled/22145

‘Management also blamed its eroded endowment, not enough donations, “operational costs,” the expense of financing its musicians’ pensions and the cost of vendor contracts.’[5] June 6th 2011. In approach of their 25th anniversary of producing theatre, Florida Stage in the state of Florida in the United Stated of America has filed for bankruptcy in June 2011, due to ‘financial challenges, declining ticket revenues and insufficient donations’, as a direct result of the financial crisis.[6]

Overall, it can be stated that the financial crisis has its impact on the arts as well as other sectors. To elaborate on the European financial sectors, in the U.K, the retail bank Nothern Rock had to be nationalized in order to endure, due to ‘over-aggressive growth in mortgage lending and over dependence short-term wholesale funding and regulatory failure’. (Goddard, Molyneux and Wilson 2009: 363) In Switzerland, UBS had heavily invested in US mortgage backed securities during the run-up to the credit crisis, an area which has shown a severe lag. As a result, the Swiss government has injected SwFr 8 billion in October of 2008 for the UBS to survive. In addition, UBS has posted up to SwFr 50 billion in write down and losses, more than any other European country. The largest collapse of all time has taken place in Iceland in 2008. Here, high online interest rates were offered between 2006 and 2008 by banks of Landbanksi and Kaupthing. These online high interest banking operations led to great losses for the online international investors in the banks, including Dutch investors. Combining an overvalue of the krona in comparison to the euro with a consumer price inflation up to 14 per cent and the domestic interest rates at 15,5 per cent resulted in the fact that the Icelandic government applied for IMF assistance in October 2008. In November the same year, the IMF agreed to provide with $2.1 billion (€1.58 billion). Furthermore, Germany has been able to run a current account surplus during the 2000’s. However, the financial crisis has hit the German banks in a similar manner as other (European) banks. In October 2008, the Bundestag established the Financial Market Stabilization Fund (SoFFin), which was authorized to provide loan guarantees up to €400 billion for new debts and liabilities incurred up to the end of 2009. In addition, two of the largest banks in Spain, namely BBVA and Banco Santander had ‘written off smaller proportions of their loans portfolios in 2007 and 2008 than many other European countries.’ (Goddard, Molyneux and Wilson 2009:368) However, subsequently, a downturn was distinguished in the Spanish economy, in combination with the collapse of a property market bubble, resulted in the fact that the capital buffers were completely worn down. (Goddard, Molyneux and Wilson 2009)

### *1.1.2. More than quality, a new vision on cultural policy*

After the Second World War, the governmental responsibility for the arts decreased and shifted towards connoisseurs which decided the allocation governmental support for cultural institutions, which often gave

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5 http://www.nytimes.com/2011/04/18/arts/music/philadelphia-orchestra-moves-toward-bankruptcy-filing.htm

6 http://www.miamiherald.com/2011/06/06/2253834/financial-crisis-closes-florida.html

preference to innovative supply. However, due to the fact that society is changing, including increasing individualization and freedom of choice, this model has moved into the background. Instead, connoisseur preferences are no longer the only criterion. This resulted in the fact that the government is currently subsidizing on a smaller scale. The responsibility and baring the costs no longer lie primarily with the government, but more with the members of society.

It is stated by secretary of state Zijlstra that cultural institutions ought to become less dependent on governmental contributions, which should result in more organizational strength and flexibility.[7]

A new cultural policy will be initiated, starting from January first 2013. This new vision on cultural policy will encompass four key priorities, namely internationalization, cultural education, renewal and talent and finally the stimulation of private and corporate sponsorship to artistic and cultural institutions. Firstly, when a cultural institution wishes to qualify for governmental support, other aspects are also very important, besides a certain standard of quality. These criteria encompass a high public interest in the cultural and/or artistic product. Not only does the size of the audience give weight in the equation, but also the composition of the audience, based on diversity in age, gender, education and personal interests.

Secondly, entrepreneurship compasses the largest description in this particular letter to the government. This could indicate that is considered being the most important criterion. From 2010 onwards, performing companies are expected to cover an own income of at least 17,5% of their income in order to qualify for potential governmental financial support. Subsequently, every following subsidy period, this percentage of own income ought to increase with 1% per year. Especially performing arts institutions should focus on this criterion, according to the secretary of state. By the year of 2015, 25,5% of income should be generated from own income.

Thirdly, participation and education are also part of the criteria, which should result in the fact that cultural institutions are more accessible for children and youth, which could also secure future audiences for cultural institutions and organizations.

International importance is mentioned fourth, which encompasses that the supply or collection is of international importance and therefore takes place in not only the national arts and culture scene, but also on an international level.

Finally, a focus on geographical key points closes the list of criteria. Not every key point has to include the exact same supply, but should be adapted to the regional profile of the particular area.

When focussing on the Netherlands, the government will reduce arts spending by 20 percent — €200 million — annually. The secretary of State of culture has stated that visitor head counts will be a factor in determining which institutions get money.

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7 Regeling van de Staatssecretaris van Onderwijs, Cultuur en Wetenschap van nr. WJZ/299782 (8314), houdende wijziging van de Regeling op het specifiek cultuurbeleid in verband met het vaststellen van de criteria voor vierjaarlijkse subsidiëring in de periode 2013-2016 (Subsidieregeling culturele basisinfrastructuur 2013-2016)

Overall, it can be stated that the national government is increasingly withdrawing from the cultural sector, as a decreasing number of cultural institutions can rely on governmental financial assistance. This results in the reduction of the subsidized sector within the arts sector in the Netherlands. In order to fill this created financing gap, cultural institutions and organizations are forced to attract financial means elsewhere, such as the private and/or corporate sector, as the examples above have shown. Besides generating financial means from other sources, cultural institutions could also make the decision to re-allocate existing means. In order to do so, several measures can be taken, such as a decline in supply of performances or a change in type of programming. This change in programming could imply a shift towards other genres, which might generate less (financial) risk. The following chapters will give more insight on how this can be applied to the Netherlands.

### *1.1.3. Discontent in the Netherlands*

Spread in the Netherlands, several actions of protest have taken place. These protests are against the governmental subsidy cuts in the arts and culture sector. Examples are numerous, such as the protest on November 20th 2010, 'Nederland Schreeuwt om Cultuur' (The Netherlands scream for culture). To this day, more than 100.000 people have screamed for culture in more than seventy Dutch municipalities to express their discontent in respect to the governmental decisions. In addition to the gathering on November 20th, a petition has been signed by ten thousands of Dutch people, including actors, presenters and other individuals working in the cultural sector.[8]

Another example is the occupation of museum Boijmans van Beuningen on June 26th 2011. With this occupation, the people wanted to ventilate their dissatisfaction with the decisions made by the Dutch government. This protest was in line with the occupation of the Rijksmuseum in Amsterdam, where 650 artists and art enthusiasts had occupied the museum.[9]

Another initiative 'No Culture, No Future' in June 2011, is that people with a social media account, for instance Facebook or Twitter, replace their profile picture by a black square with white cross and subsequently place their old profile picture in the Facebook account of the Rotterdamse Schouwburg. In this way, the initiators of this particular action intended to demonstrate the diversity of people that have been affected by the budgetary cuts in the cultural sector.

Not only will the cutbacks have their impact on the Dutch cultural sector alone, but also on an international level, according to several international artists and theatre makers, especially the performing arts sector, as written in a letter to the State Secretary of Education, Culture and Science Halbe Zijlstra. The letter is initiated by Mark Ball, artistic director of London International Festival of Theatre. The aim of this initiative is to stress the importance of the influence of smaller scale theatre groups, young talented

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8 http://blog.nederlandschreeuwtomcultuur.nl/

9 http://www.fnv-kiem.nl/agenda/detail/321

theatre makers and production companies from the Netherlands on an international level.[10] In total, including more than forty seven representatives of theatres, universities and other cultural institutions have signed this letter to the Dutch cultural secretary of state, ranging from the artistic director of the Staatsoper Stuttgart in Germany to the artistic director of Theatreworks Singapore.[11]

## 1.2. Objective of the thesis

As became clear from the introduction above, the global financial crisis has indeed affected the arts in broad sense as well, besides the general economy. Therefore, to narrow this subject somewhat, the objective of this master thesis is to examine how the global credit crunch is affecting the performing arts sector in the Netherlands. Therefore, the main aim of this thesis is attempting to a potential answer to the following question: 'What are the effects of the global credit crunch on the content of programming in theatres in the Netherlands during 2006-2012?' The reason for choosing this timeline from 2006 on is that the global economy has started to show cracks from the financial crisis in the year of 2007, which had reached an ultimate low in 2009. The intention is to focus on one particular genre within the performing arts, namely theatre.

In order to generate useful information on this subject, twelve theatres have been included in this research. Initially, fifteen theatres have been included in the research, which are the largest theatres in the fifteen largest cities in the Netherlands. However, due to time and information constraints, three theatres have been excluded, resulting in a total of twelve theatres.

### *1.2.1. Relevance of research*

One reason for selecting this topic is the continuing debate about the arts, in particular financing the arts. To this day, the global economy is still striving to overcome the impact of the financial crisis that commenced in the year 2007. In this respect, the topic of this thesis represents a current situation in which the economy is situated. Due to the fact that the economy hasn't yet recovered from the credit crunch, extensive academic research hasn't been conducted on a large scale. Naturally, other research has been conducted on numbers of visitors, performances and the pricing in theatres recently (Borgonovi 2004; Zieba 2009; Hand 2011). However, information derived from theatrical season 2011-'12 might complement the existing knowledge about the impact of the financial crisis, which will also be included in the research. Therefore, the striving of this thesis is to make a contribution to the existing knowledge on the economics of the performing arts by building on what is already known and researched.

Within this thesis, the Netherlands are the primary focus where the government has to cut spending. Like nearly all sectors, there has been an impact on the art sector as well. As a result of the recent credit crunch, governments are forced to cut spending. In this respect, arts and culture organisations receive a

10 http://www.trouw.nl/tr/nl/4512/Cultuur/article/detail/2446875/2011/06/19/Bezuinigingen-schaden-ook-Europese-cultuur.dhtml
11 http://www.productiehuisrotterdam.nl/informatie/Internationaal_protest_bezuinigingen_podiumkunsten/

decline of governmental contribution, which could have an impact on the internal organisation of the selected theatres.

There are different possibilities with regard reacting to budgetary cuts for cultural institutions and organizations. In the light of the research, the focus lies on the potential decision in changing the theatres' programming. This could have as a result that when costs of performances increase, the absolute number of performances decreases. Another way of cutting back on expenses is to alter attitude towards programming and program less high risk performances. Further along this research, it will become clear what the attitude of the selected twelve Dutch theatres is with regard to responding to the effects of the global instability as a result of the credit crunch.

#### *1.2.2. Research questions*

As mentioned previously, the content aim of the research is to conduct research on the change of content and numbers of the programming of the twelve selected theatres in the Netherlands during the period 2006-2012, due to the global credit crunch. Therefore, the main research question of the research is as following.

'What are the effects of the global credit crunch and the related budget cuts of the Dutch government on the content of programming in the selected theatres in the Netherlands during the period 2006-2012?'

In order to divide the main research question into smaller subjects, the following hypotheses will help to gain more overall insight with regard to the subject.

- Research question 1: Regarding the selected period of 2006-2012, are there fluctuations to be distinguished within the total absolute quantities of performances per season in the selected Dutch theatres?
- Research question 2: Are certain genres, such as cabaret and/or musical, programmed increasingly during the selected time period of 2006-2012, with a possible result of flattening within the programming of the selected theatres?
- Research question 3: How is the ratio of the genre theatre altering during the period 2006-2012 in the selected Dutch theatres in comparison to the overall total quantity of performances per season within the selected theatres?
- Research question 4: Which variation can be distinguished in the selected Dutch theatres when observing the segment of subsidized theatre performances per season, as part of the total number of performances within the genre theatre?
- Research question 5: Is there a relationship between price development and number of performances supplied by the selected theatres?

## 1.3. Research method

This thesis will be of a qualitative nature, based on a comparative case study, due to the fact that multiple cases are going to be compared to one another. In addition, it can also be stated that the research is of a longitudinal nature, due to the fact that the period 2006-2012 is centralized. The data analysis will be conducted on a secondary basis, which implies the use of existing sources. In this particular case, these secondary sources are program brochures of the selected theatres in the Netherlands in between the seasons 2006-2007 and 2011-2012. In addition, other sources for this thesis are governmental annual reports, with a focus particularly on budgets, expenditure and income, as well as reports from statistic bureaus, such as CBS and SCP, as well as statistics from the VSCD, the Dutch association of theatre- and concert directors. Furthermore, due to the fact that this topic is obtaining a great deal of media exposure at this particular moment in time, newspaper articles and other online sources will also be presented, both national as well as international newspapers.

Initially, the intention was to include the largest theatres of the fifteen largest municipalities in the Netherlands. However, three of these theatres weren't able to provide the complete desired information, respectively de Koninklijke Schouwburg in The Hague, as well as Theater Haarlem in Haarlem and Theater- en Congrescentrum Orpheus in Apeldoorn. For that reason, these theatres were excluded from the research and generating an eventual total of twelve theatres, spread all over the Netherlands. The theatres that have been taken up in this research include the following theatres: Stadsschouwburg Amsterdam (Amsterdam), Rotterdamse Schouwburg (Rotterdam), Stadsschouwburg Utrecht (Utrecht), Parktheater (Eindhoven), Theaters Tilburg (Tilburg), Schouwburg Almere (Almere), Oosterpoort/Stadsschouwburg (Groningen), Chassé Theater (Breda), Keizer Karel podia (Nijmegen), Podium Twente/Muziekkwartier (Enschede), Musis Sacrum/Schouwburg Arnhem (Arnhem) and Zaantheater (Zaanstad).

As stated previously, the genre theatre will be highlighted to further observe the impact of the financial crisis on the performing arts more in depth. To elaborate, the performances within the genre theatre consist of drama- and comedy performances, as well as performances focussed on language instead of music. The reason for choosing this particular genre is because this genre contains the largest share of all performances within the selected theatres, as will become clear later on in the research. Based on the ratio of subsidized and non-subsidized theatre performances, insight will be generated on whether or not flattening is occurring for this particular genre within the twelve selected Dutch theatres. After discussing these ratios, ticket price fluctuations will be discussed to examine any relation between number of performances and ticket prices.

## 1.4. Outline of thesis

Chapters 2 and 3 will represent the building blocks of this thesis, in which theories and other relevant aspects will be brought to the attention. Additionally, these chapters will outline historical events which have led to the current subsidy system. Furthermore, the data collection and methodology will be discussed in chapter 4, after which the results of the research will follow in chapter 5. Finally, chapter 6 will exemplify any forms and manners of discussion and potential suggestions for further research.

# 2. CHARACTERISTICS OF THE (PERFORMING) ARTS

## 2.1. General

In order to gain more perspective on the (performing) arts sector in the Netherlands, the following chapter will be used as a building block for subsequent chapters in this research. Firstly, the evolution of this particular sector will be discussed from the Second World War on up to now, with in particular focusing on Dutch governmental regulations and subsidy allocation. This will be done with the focus on the hypotheses of the research, as the Dutch governmental decisions are stated to have its' influence on the content of the programming within the twelve selected theatres. Secondly, general characteristics of the performing arts will be described to generate an overview of the performing arts sector, in which both the supply- as well as the demand side is discussed. Thirdly, this will be followed by cultural participation and visitors' segmentation, before finally discussing financing the (performing) arts. Overall, these subjects are included in order to generate a general overview of the (performing) arts sector.

## 2.2. Trends from the last decades

Up to the Second World War, financing the arts in the Netherlands was done by wealthy individuals and their organisations. The State took a neutral stand, except for monuments, museums and archives. Contemporary art was seen as immoral, which had nothing to do with the government. But during the Second World War this outlook starts to change, due to the fact that the oppressor initiates subsidies and acts as employer for arts and culture, with in particular performing arts and as a result determined which plays and concerts were performed. This new outlook on arts and culture shall be continued even after the war has ended, also because of a fear from mass culture from the United States, which will flood Europe. Therefore, the State had decided to intervene in the arts with the intention that the people won't become 'morally uprooted'. The main goal was to evenly spread art and culture in all different social levels. During the fifties, the number of subsidies increases for both creating and performance arts, even though the majority of the political parties assumed this subsidy-system would be of a short term nature.

Subsequently, reconstruction of the society has nearly completed and the welfare state is beginning to evolve. Expenditures of the Ministry of Education, Art and Science (OKW) increased enormously, from the fifth rank in 1950 to first a decade later. In this period, several art forms gain a position within the welfare state, due to the governmental policy of distributing culture socially and regionally and the short term attitude towards subsidising art and culture increasingly becomes a long term plan. The climate for subsidising changed during mid-sixties, due to the fact that governmental expenditure can no longer be financed by economic growth. This resulted in an increase of opponents of the at that time current government lobbying against the fact the governments is providing subsidies for a minor group in society, whilst the entire society is paying for it, without utilizing the actual cultural services. From this moment forward, this attitude towards financing of arts keeps reappearing in many political agendas.

During the seventies, the number of governmental subsidised institutions grows substantially. Initially, governmental support was less than half of the budget, what had changed quickly as many cultural institutions depend solely on subsidies within ten years. In this decade, the national government had stipulated that art is more than decoration and should fulfil a definitive position within the economy. This growth of art and culture policy is largely owed to the growth of the Dutch national income, where governmental expenditures are financed because of the economic development.

In the period 1977-1982, the financing deficit increases from 3% to 9%. In addition, collective expenses are doubled in the GDP. As a result, unemployment grows and increasing deficits force the government to cutback and re-evaluate the current status quo, including subsidy regulations. During the eighties, it has been priority to cut back the governmental influence and therefore rely increasingly more on market mechanisms. Key terms are deregulations, privatization and market mechanisms. In this respect, attention is also paid to the subsidiary system in the Netherlands. In the period 1970-1985, governmental expenses have increased from 28 to 110,7 billion guilders, equal to 30% of GDP. From this amount, 4,8 billion guilders was spend in 1970 on subsidies, while 32,2 billion guilders was spent on subsidies by the time of 1985. As a result of this development, certain industries have become close to entirely dependent on these governmental subsidies, especially in the non-commercial sector. The subsidy regulations are primarily focussed on services used by a relative small group in society. Therefore, the at that time ruling government Lubbers initiated the so called Large Operations, with restructuring the policies and cutting back expenses as primary focus points. The operations were threefold; first, to cut back the financing deficit by reorganising public financing. Second, to strive to improve the competitive position of the corporate atmosphere. Finally, improving the possibility to expand employment. With regard to the art and cultural sector, public contributions will decrease and cultural institutions are considered to approach other market orientated sources of income. All this is in favour of efficiency and the improvement of the relationship between art and the market, as stated by the ministry of Wellbeing, Health and Culture. Up to this point, any extra revenues generated by own initiatives meant paying governmental subsidies back. This has changed with the reorganisation of Dutch policy. Institutions were now allowed to direct themselves to other sources of income without being punished by returning already given subsidies. In addition, the subsidiary distribution has to be simplified, since many cultural institutions, including the performing arts sector, at that time were subsidized by several governmental levels by a variety of subsidy regulations. An extreme example is a dance company from Twente in 1978, which was financed by fourteen different subsidy regulations. (van Dulken 2002:31) As from now on, subsidies are distributed over a period of four years, the so called multiannual plans.

During the nineties, nine new funds are being established in order to build on plans made in the eighties and structure the subsidy system in the Netherlands. Subsidies are considered being channelled financial investments, which have to generate increasing effectiveness and efficiency by incorporating the market into the equation. As a result, 'Operation Big Efficiency' is born. The new government concluded that the restructuring during the eighties hadn't achieved sufficient results. Too frequently, subsidies are provided without preliminary research, in which is examined whether or not subsidies are the most adequate form.

From the 1990's on, an emergence of large scale entertainment can be noticed in the Netherlands, inspired by West End in London and Broadway in New York, which also set foot in the Netherlands thanks to Joop van den Ende. Large productions with associated large casts required larger theatres and stages, which initiated the growth in building these necessary theatres in the Netherlands. A somewhat negative consequence of these productions is that these larger productions also require more time in (de)construction and thereby increasing the opportunity costs. (Langeveld 2006; 33-34) Regarding subsidizing the arts during this period, attention had to be paid to the changing composition of the Dutch population. In response to this fact, the Dutch secretary of state of Culture, Rick van der Ploeg emphasized the importance of creating new audiences for the arts. The received subsidies coincided with the interconnection of different target groups in the arts. in order to reach these new audiences from a young age on, the so called course of CKV was introduced in the Dutch high school curriculum, which included distributing vouchers in order for the youth to visit cultural institutions either for free or with a substantial discount.

## 2.3. General characteristics of the (performing) arts

### *2.3.1. General*

This particular sector consists of subsidized and unsubsidized performances and is hard to analyze. First of all, it is hard to exactly determine what the product is. The product can be seen as the concert or the performance, without the possibility of reselling the exact same concert or performance twice. The valuation of the product differs for every consumer, as a result of own interpretations and previous experiences. Furthermore, variation in genres, companies, theatres and productions of the product can differ in between, which can make a price establishment somewhat difficult, often based on experience, which is variable or fixed amount per production. Every performance, concert, artist and performer is unique, although substitution is possible. The supply is enormous, sometimes even hard to oversee for the consumer. The market structure is a heterogeneous oligopoly, which indicates that there is a restricted amount of suppliers, whilst a restricted amount of demand. (Goudriaan, et al 2008;68) However, monopolistic competition also exists in the performing arts market. Think of Joop van den Ende theatre productions. These musical productions from van den Ende take up a large share of not only the Dutch performing arts market, but also worldwide.

### *2.3.2. Cultural organizations and artists*

Cultural organizations take up an important role in society, due to the fact that they reflect cultural identity through the works offered (values, issues, and taboos), and the form used (technology), the intensity of their presence (number of venues in a city) and the type of consumption involved. (Colbert et al. 2001:4) A cultural enterprise may be viewed narrowly, in which it represents production and distribution companies specialized in the performing arts, such as theatre, music opera or dance. Secondly, cultural enterprises may be viewed broadly, in which the cultural enterprise expands to include cultural industries and media.

The artists have a key role, due to the fact that all cultural products rely upon highly specialized labour force. In fact, artists could be categorized by the work they produce. These categorizations are as follows. First, there are creators, artists who contribute to the actual coming to life of works of arts, such as playwrights and choreographers. These creators are followed by performers, who execute the created art form, such as dancers, instrumentalists and singers. Thirdly, designers can be distinguished, who make a contribution for the scenery of the executed form of art. Fourthly, there are those who direct and co-ordinate the entire team responsible for the course of the execution of the art form, which includes directors and producers. Finally, artistic directors, who recruit, mobilize and support other artists in producing a work. (Colbert et al. 2001:3)

#### *2.3.3. Baumol*

It almost seems inevitable to mention Baumol’s cost disease when discussing the performing arts. According to Baumol (1967) the performing arts are in a permanent crisis, due to the rise of general wages whilst a stagnation of productivity occurs, which is also known as Baumol’s cost disease. Indeed, when performing ‘The Four Seasons’ by Vivaldi’, whether the year is 1723 or 2012, it takes the same amount of time and performers to execute this accordingly as intended. With the introduction of Baumol’s cost disease, the performing arts sector is considered being subjected to an unbalanced growth, due to the fact that the productivity can’t be increased while the wages actually do and therefore creating a productivity lag. These effects of these ever rising unit costs in the performing arts would result in an ever increasing gap between expenses and earned income each year (Baumol: 1967:) become evident in a research conducted by Felton (1994) when focusing on orchestras in the U.S. However, it is also stated that productivity can in fact also increase, although the wages increase simultaneously. This is due to the fact that performers are able to diversify services. This includes concerts outside to standard theatrical seasons, more touring and offering smaller ensembles. In a way, studies have shown that some performing arts such as orchestras are likely to influence the total variable costs of producing orchestras’ services. (Lange and Luksetich 1993:13) This potential of productivity increase is also supported by Cowen (1996), who doesn’t agree that productivity stagnates within the performing arts and states that the productivity actually does increase, due to the musicians’ ability to expand diversity in repertoire, processes and innovations. Another way of increasing productivity can be to introduce more capital intensive production, as a result of substituting actors by technical means, as well as choosing plays with a smaller amount of actors or having actors play several roles, according to Frey (in: Towse ed. 2003:394)

#### *2.3.4. Private demand*

Although focusing on the economics of museums, the content of Frey’s and Meier’s article on economics of museums could also be applied to economics of theatres. There are two types of demand, according to Frey and Meier (2003), which include a private and a social demand. The number of visits and thereby the private demand can be analysed by a traditional demand function, which includes three major

determinants relating to price and costs. First, entrance fees determine the respective revenue gained, together with number of visits. In addition, the price elasticity indicates by how many per cent the number of visitors decreases when the entry fee is raised by a given percentage. (Frey and Meier 2003:4)
Secondly, opportunity costs of time gives an indication what alternatives the visitors have to forgo in order to make the decision to visit a museum, or a theatre in this case. In order to measure these costs monetarily, it has to be established how much additional income could have been generated in the same amount of time of the particular visit. In this line of thought, persons with a high income and potential variable time use experience higher opportunity costs than people with a lower income and fixed working hours. The opportunity costs for visiting a museum or a theatre doesn't solely include the time spent at the actual cultural location, but also on how time is required to travel to the museum or theatre, including location, parking etc. In a way, tourists represent a different group of visitors, due to the fact that their opportunity costs are lower. This is because they often visit a city with the purpose of participating in cultural activities. According to Frey and Meier, there is no correlation found between income and attendance. Increased opportunity costs of time for wealthy people attending art performances partly offset the positive income effect. Therefore, the two effects have to be separated in order to find a positive and a negative opportunity cost effect on demand.
Third, the price of alternative activities also has its effects on determining pricing and costs. There are many alternative possibilities and activities for one to spend his leisure time. These other activities do not only include cultural activities in other cultural sectors, such as visiting cinema, museum, but also non-cultural activities, such as sports, dining out in restaurants, spending time at home or with friends. In addition, other theatres within the sector are also alternative activities for the people to select. The height of the price of (alternative) activities influences the attendance of one particular theatre. The higher the price of the other (cultural) activity, the higher the attendance for theatres is. Besides alternative goods, complementary goods can also have its effect on the number of visitors. Think of costs incurred by travel, accommodation and meals. Paraphrasing Frey and Meier (2003), the higher the costs are, the lower is the rate for museum visits, or in this case theatre visits.
Fourthly, income is also considered in having its effects on the number of visits. It is stated that people with a higher income visit cultural activities more often, due to the fact that these people can better afford the costs associated with these visits. However, note that opportunity costs also increase while income increases, making the effects of income somewhat ambiguous. In addition, it is previously stated that education doesn't generate correlation with the level of cultural participation according to Frey and Meier (2003). This is contradicted by Gray (in Towse ed. 2003), who states that is worth mentioning that education and income also correlate strongly with regard to cultural visits. People with a higher education are more capable to enjoy cultural activities than lower educated people, due to the fact that it is argued 'that appreciation of the more complex arts requires investment in 'consumption skills''. (Gray in Towse e.d. 2003: 359)

### *2.3.5. Social demand*

There are several values which can be determined as to which effects cultural activities, such as museum- and theatre visits. These values include;

- Option value; although not necessarily visiting a certain cultural activity in this particular moment in time, its existence is valued by the generated option to visit the activity in the (nearby) future.
- Existence value; although not visiting the cultural activity now or in the (nearby) future, the existence of the cultural activity is valued.
- Bequest value; deriving satisfaction from the fact that future generations will be able to enjoy utilities derived from the existence of the cultural activity.
- Prestige value; with or without actually visiting the cultural activity themselves, prestige value includes deriving satisfaction based on the knowledge that people outside the community cherish the cultural activity as well.
- Education value; creating awareness for the fact that the cultural activity influences and contributes to the people's sense of cultural and therefore value it. (Frey and Meier 2003)

## 2.4. Leisure, participation and composition

### *2.4.1. Arts audiences*

According to Becker (in Roose 2008), it is possible to distinguish different groups within arts audiences, each of which having its own characteristics, preferences and functions. The core audience contains consumers who are professionally involved in the arts world and participate more often, encourage experimentation and risk more. Members of this particular group act as peer groups and gate keepers for other art visitors. The second distinguished group contains visitors which visit the arts less frequently than the core audience and which in addition lack professional training needed in being able to decode all semantic finesses in the art form. Nevertheless, this audience provides the art with a large number of visitors which are well-informed and well-interested. Thirdly, art students are visitors within a separate distinguishable group, which generates an overlap between the first and second group. Overall, Becker wields the distinction of three different groups on loose characteristics, which based on visitors' professionalism and involvement in the arts, as well as the experience the audience has with regard to devoted time to the arts and competence and knowledge of the characteristics and position of the art form within the overall canon. (Becker in Roose 2008:238)

### *2.4.2. Leisure*

CBS has conducted research on how the Dutch population spend its cultural leisure time, which includes the percentage share of the Dutch population which has visited or still visits cultural activities and performances, which entail visits to theatre, concert- and\or music performances, ballet, house parties, movie theatres, art galleries and museums. Statistics based on the period 1983-2007 have revealed that more women than men visit cultural institutions and performances, with the exception of pop concerts, which are more so visited by men. In addition, from 1983 on, visiting percentages have increased up to 2007, with the exception of opera visiting percentages. In 1987, which is the first year in which opera visiting numbers have been measured by CBS, 5% of the Dutch population visited at least one opera performance in their life. By the time of 2007, a small decrease can be noticed compared to 1987, with a visitor’s total of 4% of the Dutch population. A peak in opera visiting numbers can be noticed in the year of 1995, namely a visitor’s total of 8% of the Dutch population. Overall, it can be stated that movie theatres are visited most frequently, namely 47% of the population in 1983 up to 55% in 2007, followed by museums, 35% of the population in 1983 to 41% in 2007. As stated previously, ballet is visited less frequently in 2007. Also the cultural activity of attending ballet performances has generated small visiting number percentages, namely 4% of the Dutch population in 1983 up to 5% in 2007.[12] Unfortunately, CBS hasn't presented any data regarding the period from 2007 up to now (yet). Therefore, we can only assume how the relations presently are with regard to visiting cultural institutions and performances. However, SCP has published research in 2009, which can contribute to the existing knowledge.

### *2.4.3. Cultural participation in the Netherlands*

When the parents are actively involved in sports, their children are most likely to be active in sports as well. The same goes for children of cultural active parents. When parents are frequent visitors of art and culture, their children will probably be as well during their life. (Wisseling van de wacht. SCP) Additionally, based on results generated in 2007, SCP has published research in 2009 on cultural reach and participation in the Netherlands, from cultural heritage to the usage of media. Within this thesis, the focus lies on the performing arts sector. Based on this research conducted by SCP, different trends can be distinguished. The genres of cabaret and popular music represent the greatest change, due to the fact that the reach of these particular genres has increased the greatest, up to a share of 30% since 1995. Classical music on the other hand has decreased in share, from 17% in 1995 to 14% in 2007. The range of (professional) theatre and ballet didn't change significantly, with a representation of 14%. Overall, it can be stated that an increase in interest occurs for the popular culture, whilst the visitor’s numbers for the more traditional culture stays more or less equal during this period of time, which generates a shift in balance towards the popular culture. (Cultuurbewonderaars en cultuurbeoefenaars 2009:9/10)

### *2.4.4. Visitors’ segmentation*

The Dutch population displays a great interest in visiting performing arts. In comparison to other European countries, visiting numbers of cultural activities are higher. Especially the average visiting numbers of theatre visits are far above European average. To give an indication, 32% of the European

12http://statline.cbs.nl/StatWeb/publication/?DM=SLNL&PA=81100ned&D1=072&D2=a&D3=0&D4=a&VW=T

population have visited at least one theatre performance per year, versus 58% of the Dutch population. (Cultuurbewonderaars en cultuurbeoefenaars 2009:59) With regard to education, the majority of the visitors have had an education at least past the age of twenty years old. Within this particular visitor group, lack of time is considered being the primary reason for not attending and/or visiting cultural activities, including performing arts performances, whereas the lower educated share of the Dutch population consider the lack of interest as main reason for not attending/visiting cultural activities, including performing arts performances. (Cultuurbewonderaars en cultuurbeoefenaars 2009:61)

It can be noted that a change in visitor's composition is occurring. To elaborate, youth, both the visitor groups 6-11 years of age as well as teenagers, is increasingly visiting cultural institutions, alongside with the continuing ageing of the cultural visitors. Especially museums, monuments, opera and classical music primary attract visitors within the age group 65-79, whilst visitors within the age group 50-64 years of age visit archives, cabaret, cinema and pop music more often.

In addition, the increasing variety of cultural activities attendance is also due to the fact that the cultural visitor increasingly becomes an omnivore by broadening and expanding taste, preferences and interest in genres other than solely the highbrow genres, such as classical music. (Peterson and Kern 1996:901)

As for the age group 20-49 years of age, visits to traditional culture, including heritage, classical music, theatre and ballet remains approximately the same. Simultaneously, popular culture, including cabaret, pop music and cinema are gaining popularity. (Cultuurbewonderaars en cultuurbeoefenaars 2009:122)

Overall, it can be stated that more high educated people attend cultural activities, performances and institutions as opposed to low educated people, although the visitor's composition is changing, due to the fact that cultural participants explore a wider variety of cultural activities.

## 2.5. Demand for performing arts in the Netherlands

In the period of 1997-2005, average income per visitor for the performing arts in the Netherlands increased substantially, even nearly doubled by 2005, which indicates an overall annual increase of 9%. However, it must be stated that this increase is mostly thanks to changing products, such as the emergence of the entertainment sector, as will become clear in chapter 5. This increase is substantially higher than the consumer price index (CPI) in the same period, which is approximately 2.4%. Although these prices increased very rapidly, demand for the performing arts of the VSCD theatres has overall remained constant, namely 12.4 million visitors per year. This indicates that the price elasticity is most likely to be very limited, unless other visiting determinants, such as income development, have compensated the effect of the price increases. (Goudriaan, De Groot and Schrijvershof 2008; 35)

Several factors can influence both demand and price sensitivity for cultural activities, including for the performing arts. The existence of complementary goods is one of these factors. When a visitor is paying an entrance fee, he also has to take other factors into account, namely the complementary services, in addition to the entrance fee or ticket price. These additional costs include, travelling costs, costs for restaurants, parking costs, among others. Often, foreign cultural participators appear being less influenced by the additional costs of these complementary goods, due to the fact that the additional costs are smaller relative to local visitors. Another factor that influences consumer behavior is the option to undertake other leisure activities, also known as substitute goods. For instance instead of visiting a live performance in a theatre, the consumer could decide to visit the cinema. However, when a particular performance or exhibition is more exclusive, the less price sensitive consumers are. The same goes for the so called 'blockbusters', big names from the industry which most likely attract many visitors. Additionally, income and education level also play a central role in consuming art. Surely, a high income level generates more spending resources, which could either imply a higher visiting frequency or more expensive ticket purchasing. People who are higher educated often have stronger and more developed preferences when visiting the arts. Also, these consumers are habited in visiting certain cultural institutions, which generates the fact that these particular consumers are less price sensitive than other consumers. (Goudriaan, De Groot and Schrijvershof 2008) This is closely linked to an American research, which emphasizes the existence of certain lifestyles as a determinant for visiting the (performing) arts. (Andreasen and Belk 1980)

When focusing on the year 2009, the total number of performances and concerts decreased with 9% to an absolute total of 35.083 in combination with a diminished number of 1.1 million visitors (-7%). According to the VSCD, the performing arts in the Netherlands have to deal with problems in threefold: less audience, a decrease of governmental subsidy and finally, a decrease in corporate revenues generated from rental and sponsoring. Although some genres display a minor decrease in visitor numbers, all genres have experienced a shrink. Expectations were slightly negative for the year to come. And as was feared, 2010 didn't bring more positive results. (VSCD brochure 2009)

## 2.6. Financing the arts

### *2.6.1. Public versus Private*

The arts can be financed by either public or private support. Within these categories, multiple resources can be distinguished. Public supports include public direct support, such as subsidies, awards and grants, as well as lottery funds provided by central and lower levels of government. (Klamer et. al. 2007) In the Netherlands, Bank Giro Loterij is an example of such a lottery, which supports the Prins Bernhard Cultuur Fonds. Furthermore, aside from this public direct support, there is also public indirect support, which refers to income that local and national governments miss out due to tax reductions and exemptions granted to cultural institutions or to companies and individuals supporting the arts and culture. (Frey in Towse 2003:390) As a result, these tax incentives will generate more funds for culture. Private support can be derived from businesses that want to sponsor an institution, often for publicity or goodwill, and support from non-profit organisations and donations from individuals. (Klamer et al.2007)

Included in public financing of the arts is financing via a fund. In the Netherlands, a fund has been established especially in favour of performing arts. This fund is called Fonds Podiumkunsten (Fund

Performing Arts). On behalf of the Dutch government, the fund generates financial contributions to all forms of performing arts. Up to the year 2012, the Fund disposes of an annual budget of €60 million of public funds. As from 2013 onwards, the Fund will have an annual budget of €43 million. The main focus points lie with internationalization, cultural diversity among artists, companies and podiums. In addition, stimulating innovation within creating, producing, distributing and supplying the arts is considered being a special task of the Fund.[13]

### *2.6.2. Reasoning for subsidizing the arts*

Literature on justifications for subsidizing the arts is numerous. For example, it is often stated that arts and culture should be publically financed, due to the national prestige these national treasures are able to generate, in addition to making a contribution to education, the cultural enrichment of the national and international population as well as generating unlimited enjoyment as a result of the attached aesthetic value. (Fullerton 1991:67)

Additionally, it is often argued that the arts represent so called positive 'merit goods', goods which are supposedly good for society and should therefore be publicly financed by the government for that specific reason. Subsidized companies are expected to generate innovation in the sector. Therefore, subsidized companies play pieces only for a short amount of time, after which a new play is created. This is in contrast with so called commercial producers, who program a certain piece for as long there is still demand. (Langeveld 2006;70) Austen-Smith (1994) states that reasoning for subsidizing the arts often comes in twofold, namely extrinsic and intrinsic. The extrinsic reasons cover the existence of the imperfect market for the arts. As a result, due to this market failure, the arts are financed from other sources, in this case public sources. Secondly, intrinsic arguments are described as arts being good and therefore will have a good impact on society. In a way arts are seen as a necessity for society. When the public participates in the arts, these cultural participants generate better citizens, according to Baumol. (1995 interview) Theatres can also influence the local economy, due to the impact they can have on the surrounding services like restaurants, parking and taxi's. In addition, an attractive theatre with programming to match generates a positive climate in the city, which positively affects public order and consumer pattern of the public. (Langeveld 2009:181) In addition, theatres are able to incite positive external effects, such as pride for the existence of the theatre in the city or the possibility to offer a podium for amateur arts to express creativity. (Langeveld 2009:180)

### *2.6.3. Pricing mechanisms*

With regard to pricing mechanisms in the performing arts in the Netherlands, it can be stated that venues wield variable behavior. Overall, the seats with regard to the smallest stage often include only one ranking. Some theatres also handle one rate for the seats for the larger stage performances, while other

13 http://www.fondspodiumkunsten.nl/over_het_fonds/

theatres can include more than three ranks in seating arrangements and associated ticket prices, with rank one having the best seats in the theatre. (Langeveld 2009:161) Not only can the introduction of price differentiation act as an approach to increase revenue, it can also be considered a clever marketing approach. In addition to this price differentiation, price discrimination is also used frequently by cultural institutions, including institutions for performing arts. This is worthwhile when consumers have different responses to prices. Different segments of the market are represented by different (ticket) prices. For instance, having lower prices for young people and senior visitors. Also, another way of having price discrimination is to have different prices for different days of the week. (Towse ed. 2010:58/59)

The height of the price can be influenced by several factors. Firstly, when a service or good is more unattainable to a consumer, the higher the service provider will set the price. Secondly, the more testable the service is, the lower the risk for the consumer, which increases the willingness to pay for the consumer. Thirdly, the more standardized the service is, the greater the level of price sensitivity is for the consumer. Fourthly, the more customized the service is, the lower is the consumer's price sensitivity. Fifthly and final, the greater the need to obtain the visitor for a long-term period, the lower the price will be of the service. (Arnold, Hoffman & McCormick 1993:32) These pricing mechanisms will be discussed in chapter 5 which includes the results of the research with regard to the twelve selected Dutch theatres.

# 3. ECONOMIC DEVELOPMENTS AND GOVERNMENT POLICY

## 3.1. Introduction

Within this chapter, several topics will be connected. Firstly, the global economic developments will be discussed, with in particular the global credit crunch. Secondly, an outline of the Netherlands' international position will be elaborated on, as well as the impact of the global economic downturn on the economic position of the Netherlands. Furthermore, the different levels of subsidizing in the Netherlands will be discussed, as well as the governmental expenditures, before shifting the main focus towards the Ministry of Education, Culture and Science, with in particular the changing attitude towards arts and culture in the Netherlands. In this section of the chapter, the Culture Notes since 2004 will be discussed with the intent to elaborate on Dutch cultural policy. This chapter will conclude with two topics derived from Dutch government cultural policy which have the possibility to have a substantial effect on the content of the performing arts in the Netherlands and therefore an impact on the outcome of this research.

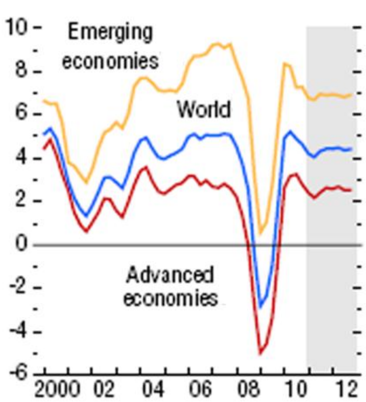
## 3.2. World economy

For 5 years prior to 2009, the global economy was considered to be booming. Global GDP rose at an average of about 4.75 percent a year, its highest sustained rate since the early 1970s. In the table below, an overview of GDP development and a forecast published by the Worldbank in its June 2011 publication of Global economic Prospects, has been presented for the major economic regions.

Table 31 GDP growth rates for major economic regions (in %)

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| World | 4.0 | 5.3 | 4.9 | 5.4 | 5.0 | 3.9 | -2.2 | 3.8 | 3.2 | 3.6 | 3.6 |
| USA | 2.5 | 3.9 | 3.2 | 3.3 | 2.0 | 1.6 | -6.3 | 4.0 | 0.1 | 2.6 | 2.0 |
| EU 27 | 1.5 | 2.6 | 1.9 | 3.2 | 2.6 | 1.3 | -4.1 | 1.7 | 1.7 | 1.8 | 1.9 |
| M. East | 6.5 | 5.6 | 5.4 | 5.7 | 5.9 | 6.4 | 2.8 | 3.1 | 1.9 | 3.5 | 4.0 |
| China | 10.0 | 10.1 | 10.4 | 10.7 | 11.9 | 9.7 | 9.1 | 10.3 | 9.3 | 8.7 | 8.8 |

Source: Worldbank, IMF, World Economic Outlook Database




Source: IMF annual report 2011

The graph illustrates the average global GDP growth of the world and emerging economies. Recovery is uneven within global GDP. GDP growth is lower in advanced economies and unemployment is high. In the United States and the euro area, the recoveries are tracking those of the 1990s, despite much deeper falls in output. Emerging and developing economies have not been hit as hard by the crisis as advanced economies and are already in expansionary mode. Asian countries have experienced a strong rebound.

The global financial crisis is no longer considered to be the major force dictating the pace of economic activity. The majority of developing countries has, or is close to having regained full-capacity activity levels. As a result, country-specific productivity and sectorial factors are now the dominant factors underpinning growth.

## 3.3. Economic developments in the Netherlands

According to recent insights of CPB in September 2011, the Dutch GDP has increased with 1.5% in 2011 and 1% in 2012, which is significantly less than the overall average of the past 20 years. During this period, the average increase has been 2.25%. It is predicted that the Dutch GDP will reach the level as it has been before the credit crunch in the second half of 2012. This indicates the fact that the Dutch economy hasn't experienced any growth in over 4 years. The Dutch economy will be effected by the budget cuts and increasing costs made by the government, although the effects of the growth delay in Western countries have the most impact, which has commenced from the beginning of 2011. The growth that the economy in the Netherlands will experience is mostly derived from export, as national expenditure will generate a limited positive growth of ¼ to ½%-points. The Dutch consumer still experiences the effects of the global credit crunch and will therefore not contribute to the economic in 2012. In addition, the Dutch government will exercise even more pressure on the GDI in the Netherlands. In the last four decennia, a negative growth contribution has only occurred in the year of 2004, which is due to the great governmental financial cuts.

As a result of governmental financial and budgetary cuts, the governmental finances will improve. The state deficit will decrease from 5.1% of GDP in 2010 to an expected 2.9% of GDP in 2012. This results in the fact that the state deficit has decreased to half in comparison to the year 2009. In order to maintain this situation, the Dutch government intends to implement more financial and budget cuts. However, the Dutch consumer will become the victim from these budget cuts, as the purchasing power will decrease as a result from the rising inflation. Where inflation has been 1.3% in the year 2010, it is estimated to be 2¼% in 2011 and 2% in 2012. The inflation of 2011 was primarily to blame on higher entry rights, whereas the inflation in 2012 will be granted to domestic factors, such as increasing rent prices, gas prices, indirect taxes and labor costs per manufactured unit.[14]

## 3.4. Governmental expenditure in the Netherlands: broad to narrow

### *3.4.1. Introduction*

The focus is now becoming increasingly narrow. After discussing the effects of the credit crunch on a global as well as a national level, the next paragraph will zoom in even more and include the Dutch

14 http://www.cpb.nl/persbericht/3210847/economisch-beeld-ongewis

governmental expenditure with regard to cultural policy. In the Netherlands, we can distinguish four different levels of subsidizing culture. These levels include the so called Basis Infrastructuur (BIS) by the national government, with in particular the Ministry of Onderwijs, Cultuur en Wetenschap. Secondly, the Dutch government provides the 'Nederlands Fonds voor de Podiumkunsten' (NFPK) with financial means, which are subsequently distributed by this fund. On a third level, Dutch cultural institutions and organizations are subsidized by the twelve Dutch provinces and/or municipalities. Finally, besides the NFPK, the Dutch cultural market is familiar with other cultural funds, such as the Prins Bernhard Cultuurfonds. In order to gain perspective on the relationships between these different subsidy providers, all four will be discussed in the next subparagraphs.

*3.4.2. The national government*

From January 1st 2013, the situation is about to change radically for the cultural sector in the Netherlands. Cultural institutions are expected to be less dependent on governmental subsidies and therefore have to rely more on own income. In the performing arts sector, institutions have to be able generating an increasing percentage own income in the next four years in order to have a chance at subsidy. According to the Dutch government, the government is acting too intensely as a main financer of the bulk of cultural institutions in the Netherlands. At this moment, artistic quality is considered to be the main incentive for subsidizing a particular cultural institution. In addition, the Dutch government wants to expand this stipulation by including other factors to the equation, such as entrepreneurship and audience reach, which also became clear in the elaboration of the Performing Arts Fund above. Also, instead of spreading subsidy as much as possible, the government has decided to act more directly, which is uttered by distributing subsidy in a way that the top of the Dutch cultural life is able to maintain their standard of "international allure". In total, 200 million euro will be cut from the cultural governmental budget.[15] The fact that only the top institutions maintain their subsidy standard is being emphasized in a Dutch newspaper article 'de Volkskrant' on June 10th 2011 by secretary of state of culture, Halbe Zijlstra, when in fact, these institutions are spared more than others. As stated previously, a subsidy cut of 200 million euro will be made in the cultural sector. Within the performing arts sector itself, a staggering 80 million euro will be cut, leading to the fact that this particular subsector will suffer most from the governmental subsidy cuts, from 236 million to 156 million. In total, 700 million euro in governmental subsidies will remain, which are going to be distributed amongst 90 cultural institutions that are included in a so called *base infrastructure system* (BIS). By these actions, this BIS will be bisected. As a result, the largest organizations are more likely to survive these reforms, as opposed to the smaller organizations.[16] In a way, Zijlstra is primarily focusing on the crème de la crème of the Dutch art. He attempts to spare the top institutions that exist in

15 http://www.rijksoverheid.nl/nieuws/2011/06/10/kabinet-maakt-scherpe-keuzes-in-cultuur.html (14 juni 2011)

16 http://www.volkskrant.nl/vk/nl/2676/Cultuur/article/detail/2444074/2011/06/10/Bezuinigingen-cultuur-hardste-klappen-bij-theater-en-beeldende-kunst.dhtml

the Netherlands, while neglecting the smaller scale cultural institutions with upcoming artists. In addition to the threatening impoverishment of the Dutch cultural landscape, the State Secretary of Education, Culture and Science has expressed intentions to abolish the existence of the 'Cultural Card', with which the youth can visit cultural institutions with a discount.

#### *3.4.3. Nederlands Fonds voor de Podiumkunsten*

This particular Fund acts on behalf of the Dutch government and distributes subsidies for professional music, music theatre, dance and theatre in the Netherlands. The Fund strives to support quality in the broadest sense, while having an impact on as many people as possible. The Fund annually distributes a budget of around €60 million of public money. Alongside four-year-long support agreements, the Fund offers one-off and two-year-long project support grants, as well as program grants and individual grants for composers and performance artists. Special attention is being paid to internationalization, cultural diversity and entrepreneurship among artists, companies and venues. The stimulation of innovation in the chain of creation, production, distribution and programming is one of the Fund's special tasks.[17]

#### *3.4.4. Provinces and municipalities*

The Netherlands are divided into twelve provinces. These twelve provinces combined generate a total of 415 municipalities.[18] Within these 415 municipalities, there are 158 theatre managers of the VSCD located by the time of 2008. (Langeveld 2009:30) The provinces are responsible for culture when culture exceeds the local interest. In addition, the provinces are expected to be responsible for the spread of cultural facilities as well as the financing of regional heritage, such as provincial collections and museums. Furthermore, the responsibilities of the municipalities lie with the providing and up keeping of the accommodations for performing arts, as well as financing the management of municipal collections and museums.[19]

#### *3.4.5. Other funds*

In addition to the governmental subsidies as well as the NFPK, there are other funds from which cultural institutions can apply for subsidies, such as the 'Prins Bernhard Cultuurfonds'. This particular fund is a beneficiary of the BankGiro Loterij. It is one of the biggest independent private funds for culture in the Netherlands. It has been established in the year of 1940 with the purpose of promoting cultural and nature oriented activities. In order to accomplish this, the fund grants financial support to individuals and organizations that are committed to this particular purpose. The resources of this fund amount around €24 million annually and are generated by donations, gifts and collections, in addition to the revenue from

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17 http://www.fondspodiumkunsten.nl/english/
18 http://www.cbs.nl/nl-NL/menu/methoden/classificaties/overzicht/gemeentelijke-indeling/2012/default.htm
19 http://www.rijksoverheid.nl/onderwerpen/kunst-en-cultuur/financiering-culturele-instellingen/cultuursubsidie-van-de-provincies-en-of-gemeenten

the BankGiro Loterij and the Lotto[20] Furthermore, the cultural sector in the Netherlands includes more funds which distribute financial support to the (performing) arts, including SNS Reaal, VSB Fund, VandenEnde Foundation.

## 3.5. Cultural Notes

To elaborate more on Dutch governmental policy and in order to demonstrate what the Dutch governments have considered being crucial criteria for subsidizing cultural institutions, three Culture Notes have been examined namely Culture Notes of 2001-2004, 2005-2008 and 2009-2012, as well as the advice from the Raad van Cultuur for the governmental period of 2013-2016. Key criteria from these culture notes will be discussed below. The reason for including these cultural notes is to display the decision making process of the Dutch government during the period 2006-2012.

### *3.5.1. 2001-2004*

As described in the Dutch Culture Note of 2001-2004, decisions on whether or not distributing subsidies to cultural organizations and institutions are not only based on the level of quality of the arts, but also have to measure up to additional cultural political criteria and priorities. These criteria include enforcing existing programming, enhancing cultural diversity, investing in the youth, displaying national cultural abilities, cultural plan ology give attention to new media, international cultural policies and cultural entrepreneurship. (Culture Note 2001-2004:p5)

With regard to the performing arts, the Culture Note encloses priorities such as stimulating a high and varied supply of arts, as well as creating room for innovation and continuity of key objectives. As a result of this particular Culture Note, dozens of new theatre companies can expect to receive structural governmental contributions. Aside from these new companies, which represent innovation, existing companies could also expect to receive governmental contributions, but in this case based on building on their existing visitors base, by enriching these relationships.

### *3.5.2. 2005-2008*

Within the introduction of the Culture Note of 2005-2008, a new perspective with regard to cultural policies is distinguished, based on social awareness in society instead on social awareness in arts and culture. In order to generate this awareness, arts and culture have to become increasing important and integrated in the lives of the Dutch population. As a result, the following criteria have been of a center point nature. First, the stimulation of urban and regional dynamics of arts and culture is mentioned. This is generated by a well distributed system of cultural facilities, since it is due to these cultural facilities that cities become attractive for the creative class to settle in; highly educated people who fulfill an occupation which requires a certain amount of creativity. Secondly, cultural diversity is highly encouraged, which also became clear from the previous Culture Note of 2001-2004. Up to now, cultural diversity exists in society,

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20 http://www.cultuurfonds.nl/t1.asp?path=bdlih0pd

as well as an inability to interconnect these cultural circuits. Therefore, it is important to no longer isolate these circuits, but cooperate. Finally, the third focus point within this Culture Note is enforcing supporting institutions, which include non-producing tasks, such as the supply of information, documenting and archiving, improving education, conducting research and generating representation.[21]

### *3.5.3. 2009-2012*

During this particular period, which also initiates a new subsidiary system in the Netherlands, an additional 10 million euro has been invested in the so called base infrastructure, in order to generate a strong spread cultural infrastructure in the Netherlands. With regard to distributing subsidies, attention has been paid to the ability of cultural organizations to generate a strong, innovative standard for the position of Dutch art and culture on an international level. As a result, several functions have been introduced. These functions include a developing function, based on an initiative by the State to create and generate conditions for an innovative basis infrastructure, which rives room for talent, experiment, research and innovation. Secondly, the function international platform has been initiated and included in this basis infrastructure, in order to strengthen the position of the Netherlands on an international level. Furthermore, it is important for all organizations included in the base infrastructure to be increasing anchored in society and therefore generate more own earned income for their selves.[22]

### *3.5.4. 2013-2016*

For the period of 2013-2016, even more budget cuts have to be implemented. What the near future will bring, according to the advice of the Raad voor Cultuur (Board of Culture), is that €125 million budget cuts will be made in comparison to the current budget for culture. The secretary of state of culture has requested the Raad voor Cultuur to generate budget cuts, which take up a quarter of the existing national budget for culture in the Netherlands. When these decisions will be implemented, this will result in an obvious dilution of culture, according to the Raad van Cultuur.

To elaborate, as a result, entry fees will rise substantially, with the potential consequence of a decrease in visitor numbers. In addition, employment will drop; chances for top talents will diminish, as well as opportunities for innovation and experiment. The Raad stresses the fact to handle the 6% VAT rate, in order to increase the option of generating a higher own income within the subsidized arts sector, which is the current status quo.

The cultural sector should broaden its financial basis, with an eye towards entrepreneurship in the cultural sector. As a result, marketing will have to become increasingly important. Therefore, the Dutch government should implement regulations that stimulate such an organizational attitude, instead of undermining it, by for instance creating a tax provision which increases the attractiveness for entrepreneurs to settle in the cultural industries. Due to the invasive nature of this budget cuts operation,

21 http://www.cultuursubsidie.nl/downloads%20OCW/Cultuurnota%202005-2008.pdf
22 http://www.cultuursubsidie.nl/downloads%20OCW/Subsidieplan%20Kunst%20van%20Leven%202009-2012.pdf

a transition period will be initiated up to the year 2015. During this period, the changes and budget cuts will be implemented gradually, according to the policy of Raad van Cultuur. As for the performing arts sector, the overall budget will decrease with €58.7 million, from €225.7 million to €167 million. The Culture Note will include nationally one ballet dance company, two national symphonic music facilities and six regional, two accompaniments facilities, one national opera/music theatre facility and one international performing arts festival. Regionally, eight theatre facilities, one excellent international theatre, one production institution for theatre, three dance facilities and one internationally excellent dance production will be included. The Fonds voor Podiumkunsten will dispose of €54.07 million to distribute amongst performing arts institutions and organizations. (Advies 2013-2016 Raad van Cultuur p.9)

Consequences of these budgetary cuts come in six fold, according to the Raad van Cultuur. First, the supply of arts will become less accessible, due to the increase in ticket prices with an expected increase of 20%. As a result, sale prices for art performances and products will increase, which results in a diminishing market and will the Netherlands no longer be European leaders with regard to cultural participation. Second, it is expected that the implementation of the regulations will result in an impoverishment of the supply side of the arts, due to the fact that many artists and performers will lose employment. Furthermore, chances for top talents will decrease, as the growth of new top talents will stagnate and subsequently the dynamics of Dutch art as well. Due to the budgetary cuts, both innovation as well as experimental productions will have fewer opportunities, although this is mostly applicable to the e-culture. Fifth, the (inter)national economic position of the Netherlands will be compromised, as culture is an important import and export product. Focusing on the performing arts, orchestras and dance companies are probably forced to charge higher buy out sums, with the risk of not being hired the next time around. Finally, the employment will decrease severely, given the fact that several thousands of jobs within the arts and culture institutions will be lost, as well as thousands of independent artists who will lose chances of making a living from art gaining.

### 3.6. Entrepreneurship in the arts; a changing attitude

As discussed previously in paragraph 1.1.2., an entrepreneurial attitude is desired by the Dutch government for cultural institutions in the Netherlands. Therefore, the concept of the cultural entrepreneur will be discussed in this particular paragraph. The cultural entrepreneur is becoming more dominant in the art world. (Klamer 2011:141) A good entrepreneur is good at realizing financial as well as cultural values, while bridging the arts the market. To elaborate, a good cultural entrepreneur has several characteristics, which include:

- Alertness to opportunities
- Being creative towards the artistic content but also in the way in organizing the conversation and arranging the finances.

- Primarily focusing on the artistic content, while the rest is subsidiary, including the economics.
- Being persuasive in convincing artists to work with them, getting people interested and involved as well as the ability to generate the necessary funds, such as donations.
- Being prudent and exhibit courage, hope, and faith in their actions. (Klamer 2011:155)

It can be stated that cultural institutions are inclined to change their attitude towards visitors by adopting an entrepreneurial attitude as competition is fierce. Not only do the cultural institutions have to compete among themselves for the visitor to decide to visit their particular institution, but also with other leisure activities. Ballantyne and Uzzell (2011) have conducted research for another type of cultural institution, namely museums. What became clear from this research is that this competition for the visitors' participation has given rise to what they call the visitor-centered museum. Institutions spend much of their time and money exploring visitor motivations, needs, and satisfaction in order to attract them onsite through the marketing and delivery of satisfying experiences. Institutions which distribute funds, grants and donations increasingly use visitor numbers as a crude measure of a museum's success. Visitor attendance is seen as a good indicator of demand and perceived worth (Ballantyne and Uzzell 2011) In addition; Pine and Gilmore have conducted research on the altering attitude of museums as well. Museum practice is being changed by decreases in government funding for formal and informal post-school education; a focus on the visitor as ''client''; the rise of informal mass education within the ''experience economy'' (Pine and Gilmore 1999); and altered perceptions of the role and place of museums in supporting growth in the tourism sector and demonstrating value in serving local communities.' (Ballantyne and Uzzell 2011:87) With regard to performing arts in the Netherlands, this research could generate interesting results of the effects of this increasing importance of entrepreneurship within the cultural sector, as the institutions could become more visitor oriented with a possible result in a change in content of programming. To elaborate, the question is whether or not will the content of the selected theatres become increasingly homogeneous and market driven, due to increasing desire of an entrepreneurial point of view.

### 3.7. Applying the high VAT rate and its possible consequences

For both subsidized and commercial performing arts, it has been the intention to permanently apply the high VAT rate of 19% will be applied in order to generate more means for the Dutch government.[23] However, this could implicate counterproductive reaction, according to Dutch research and consultancy bureau APE, represented by Goudriaan (2010). Especially visitors of the commercial performing arts turn out to be more price sensitive than the subsidized performing arts visitors. This is due to several factors,

23 Note that the Dutch government has currently decided to maintain the VAT level 6% for the performing arts in the Netherlands.

including the fact that visitors already have to pay more for high priced commercial performing arts than for subsidized performing arts. Secondly, visitors of the commercial performing arts generally have lower incomes. In general, price elasticity lies between 0.3% and 0.5%, but there are exceptions. According to the econometric analysis conducted in this particular research, the number of visitors decreases with 1.1% for every percent that the VAT will be increased. This hadn't been taken in consideration by the Dutch minister of Finance when proposing this new regulatory, who didn't expect a drop in demand to occur. This drop in demand will probably generate less revenue than the coalition expects, namely approximately with 20%, which results in a financial gap in the tax plan. However, based on price elasticity research conducted by Seaman (2006:425), it has shown that price elasticity is generally much lower than this result by Goudriaan, mostly even displaying an inelastic result.

By increasing the VAT rate with 13%, venues and institutions are forced to increase entry fees with 12, 3%, which will likely result in a decrease of number of visitors by with 13.5% for the members of the Association of Independent Theatre Producers (VVTP). This extra downturn in visiting numbers of 1 million visitors will come on top of the already existing decline of 2 million visitors in the season of 2009-2010, as a result of the economic crisis. This decline can get aggravated even further when the prices of other substitute goods and services remain at the low VAT rate of 6%, such as the cinema, due to the fact that the price difference between theatre and cinema will be augmented.

As a result, according to the research of APE, the earnings of the VVTP members will fall with 13,5% (over € 18 million) on top of the decline of €45 million euro in 2009, due to the fact that the earnings generated from the VAT must be completely consigned to the government.

From season 2008-2009 on, entry fees have been lowered in order to maintain a steady demand of visitor numbers. However, in 2009-2010, the reduction wasn't enough and therefore couldn't avoid the decline in visits. As a result of this development, combined with lower purchasing power and consumer confidence, the overall earnings from the VVTP members decreased with €45 million. The VCSD (Vereniging Concertgebouw en Schouwburg Directies) noted a strong decline in visits, especially within the commercial performing arts. This resulted in an increase in governmental subsidized performing arts in 2009.(VSCD Podia 2010:6) Previously to this research, APE had conducted a research on the benefits from the reduced VAT rate for art. The low VAT rate was applied in 1998, as compensation for the extra costs of the ' Arbeidstijdenwet' as well as the ' Pensioenregeling' as a result of the many travelling hours within the performing arts sector. Moreover, the performing arts sector is an exception as regards to labor productivity, due to its difficulties of enhancing the productivity whilst salaries increase together with all salaries in the general economy[24.] This is also known as Baumol's cost disease, which has been mentioned previously.

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24http://www.rekenkamer.nl/Actueel/Onderzoeksrapporten/Introducties/2010/05/Inzicht_in_belastinguitgaven_specifieke_uitkeringen_en_subsidies/Belastinguitgaven/Evaluaties/Evaluatie_van_het_verlaagde_btw_tarief_voor_cultuur_en_media

### 3.8. Conclusions so far: the cricket and the ant

Even though it has been centuries ago, the fable of the cricket and the ant still seems to be of an actual nature, because of the on-going discussion within the cultural sector in its broadest way.

The economy is still in rough weather, which definitely appears to exercise its pressure on the cultural sector in the Netherlands, as is noted in the press release of Dutch government on June 10$^{th}$ 2011 and various newspaper articles published on June 10$^{th}$ 2011. A shocking high amount of money will be cut from the cultural budget, namely 200 million, from which 80 million will be extracted from the performing arts, resulting in the fact that the performing arts sector will be struck hardest by these governmental subsidy cuts.

An entrepreneurial attitude towards market mechanisms appears to be the approach for the cultural institutions in trying to survive these meager times. An own earned income of 21.5% will be the standard for performing companies before even being able to apply for grants from the government.

# 4. METHOD AND DATA COLLECTION

## 4.1. Introduction

The following chapter will describe the manner in which the data collection is generated in order to collect the desired information and therefore give answers to the research questions. Note that the primary focus lies on the theatres instead of performing companies. However, these performing companies will be discussed later on in the research, when discussing the selected theatre genre and possible price fluctuations during the time span of the research. The final paragraph of this chapter will include reasoning certain subjects which have been excluded from the research to indicate boundaries.

## 4.2. Research method

The data on which this thesis will be based will be of a secondary nature from twelve case studies. The largest theatres of the twelve largest cities in the Netherlands have been included in the sample. In later research, more theatres could be included, for instance the theatres on a smaller scale, from which a possible comparison can be made. Note that the original sample consisted of fifteen theatres, but since three theatres weren't able to deliver the desired information with regard to this thesis, they have been excluded from the research, which brought the total number to twelve.

As stated previously, the case studies included in this thesis are the largest theatres, offering a highly number of subsidized performances, respectively the following theatres, with the exclusion of de Koninklijke Schouwburg in The Hague, Theater Haarlem in Haarlem and Theater- en Congrescentrum Orpheus in Apeldoorn; Stadsschouwburg Amsterdam (Amsterdam), Rotterdamse Schouwburg (Rotterdam), Stadsschouwburg Utrecht (Utrecht), Parktheater (Eindhoven), Theaters Tilburg (Tilburg), Schouwburg Almere (Almere), Oosterpoort/Stadsschouwburg (Groningen), Chassé Theater (Breda), Keizer Karel podia (Nijmegen), Podium Twente/Muziekkwartier (Enschede), Musis Sacrum/Schouwburg Arnhem (Arnhem), Zaantheater (Zaanstad).

## 4.3. Time span

The data consists of the program brochures of the selected thirteen theatres in the Netherlands during the period between season 2006-2007 and current season 2011-2012, which brings the data to a total of 78 brochures. Based on these brochures, any changes can be noticed in the programming of the theatres during this particular period. The reason for selected this particular time period is due to the fact the financial crisis had started in the year of 2007, making season 2006-'07 the first season during the financial crisis and therefore a good starting point.

## 4.4. Data collection and processing

After receiving all the brochures, the subsequent step has been tallying all the performances per theatre per season in order to gain perspective on the total absolute number of performances. In total, the absolute number of performances during the period 2006-2012 for all twelve selected Dutch theatres is 26.863. Within this particular stage of the research, different genres have been distinguished, namely theatre, music theatre, musical/show, dance, youth theatre and opera. However, during this procedure, several problems occurred in different theatres, due to the fact that not all theatres applied the same genre characterizations. To elaborate, in seasons 2006-'07, 2007-'08 and 2008-'09, Stadsschouwburg Groningen/Oosterpoort handled the genres theatre and music theatre as two different genres. However, the following seasons 2009-'10, 2010-'11 and 2011-'12 these two genres have been combined into one genre, namely theatre/music theatre. As a result, the different genres have been separated in the data collection. The music theatre performances have been filtered out in the next part of the research with the aim of avoiding unnecessary bias in the research.  Additionally, a problem of the same nature has occurred at Parktheater Eindhoven, for the genres musical, show and entertainment. In seasons 2006-'07, 2007-'08 and 2008-'09, Parktheater Eindhoven has divided performances within this type of genre in either musical or show. Within the following seasons 2009-'10, 2010-'11 and 2011-'12, these performances have all been joined as musical/show. Also Chassé Theater Breda presented a similar irregularity within the classification of genre. In seasons 2006-'07, 2007-'08 and 2008-'09, the genre opera/operetta was a separate genre. From season 2009-'10 onwards, opera was joined with the genre of music theatre.

#### *4.4.1. Developments in genre classifications*

After accounting for all performances within this particular research sample, it will be established whether or not any clear fluctuations in genre preferences can be noticed. In order to do so, the number of performances per genre will be compared for every season in absolute numbers. After this is completed, the focus will shift towards the relative shares of genres per season. For every season, it will be researched which genres have been programmed mostly and which fewest.

#### *4.4.2. Genre theatre*

After dividing all performances into different genres, the next stage of the research encompasses to take the genre of theatre separately from the other genres in order to further research the potential effects of the financial crisis on the programming of theatres in the Netherlands. The reason for selecting the genre of theatre is because this particular represents the largest share within the total number of performances taken up in the research sample. In total, the data collection includes 6652 theatre performances.

With the number of theatre performances being defined, all 6652 theatre performances have been studied separately in order to exclude the previously mentioned bias of potentially belonging to another genre, such as music theatre. In addition, foreign performances have been excluded from the sample, as the interest in the outcome of the research lies at the impact of the financial crisis on the domestic producing market.

#### *4.4.3. Subsidized vs. non-subsidized*

For the remaining theatre performances, it has been researched whether or not the performances have received subsidies from the Dutch government. This has been distinguished based on different sources. First, both the Culture Note of 2005-2008 as well as 2009-2012 both include a list in which theatre groups and companies have been included and may therefore receive governmental contribution. In the data collection, these performances have been categorized as being performances type S1. Furthermore, the collection of performances typed as S2 includes theatre performances that were subsidized by the Fonds Podiumkunsten (Fund for the Performing Arts). As stated previously in this research, het Fonds Podiumkunsten distributes subsidies in name of the Dutch government. As can be seen in the data collection included in the annexes of the research, this particular fund has supported mainly from season 2008-'09 onwards. In addition, the categorization of subsidy type S3 includes performances which have been subsidized by the government on a lower level, namely provinces. Finally, performances which are typed as S4 performance have been financially assisted by the city in which the theatre group of company is based. Note that every theatre performance has been studied separately in order to gain as much insight as possible on the share of subsidized performances.

#### *4.4.4. Ratios*

With the division made of subsidized and non-subsidized theatre performances, the next stage of the research contains the ratios of subsidized theatre performances and the total number of performances labeled as theatre performance. In this respect, it can become clear to what extent the ratios change during this period of time and thereby establishing if there are in fact increasingly more performances subsidized. With respect to the research questions, this part of the research will give answer to the question whether or not flattening occurs within the genre of theatre.

#### *4.4.5. Ticket price fluctuations*

In the final part of the research, prices have been studied in order to gain perspective on any potential price fluctuations during the period of 2006 and 2012. Due to the fact that the entire subsample of theatre performances includes 6652 performances, a selection has been made of several theatre groups and companies in order to establish the potential existence of fluctuations in ticket prices. This sub division within the sample of theatre performances includes the following theatre groups and companies: Het Nationaal Toneel, Het Zuidelijk Toneel, Noord Nederlands Toneel, Paardenkathedraal, RO Theater, Theatergroep Het Vervolg, Toneelgroep Amsterdam and Toneelgroep Oostpool. The reason of selecting these eight theatre groups and companies owns to the fact that these eight theatre groups and companies are the only theatre groups and companies that are included in both Culture Note 2005-2008 as well as 2009-2012 and can therefore generate a certain level of consistency and continuity in this research. To avoid as much bias as possible, it has been decided to exclude the theatre performances performed in the small stage halls within the theatres, and instead decided to only include the large stage performances. In addition, these ticket prices will be compared to the overall inflation within the general economy of the Netherlands, based on statistics from CBS. This comparison will be conducted based on the average inflation of the ticket prices during the period of 2006-2012, as it is difficult to do this separately for every season, because the theatre seasons take up a different period of time than the annual reports by CBS. In short, the research question which will be answered in this particular part of the research is whether or not prices increase as the quantity of performances decrease.

### 4.5. Excluded from research

With regard to pricing, it has been decided to focus only on the prices the visitors have to pay per ticket and the potential fluctuations which accommodate these ticket prices. .Therefore, the costs theatres make in order to be able to program performances have been excluded, due to time and information constraints. . In addition, it has also been decided not to focus on conducting research on the effects on quality on the prices of performances, since these products are non-homogeneous of nature, which makes defining quality for the performances difficult. However, both subjects could be interesting point of views in order to conduct research in the future to expand this particular research and thereby generating more insight in the effects of the financial crisis on the content of programming in the Netherlands.

The next chapter will describe the results of the research and the annexes will include the detailed information on the integrated theatres in this research.

# 5. RESEARCH

## 5.1. Introduction

The following chapter will firstly describe the total number of performances per theatre per season, where fluctuations can be noticed within the total numbers of performances. After this, the genre theatre will be taken aside from the rest of the genres. In this part, the number of theatre performances will be compared per season and theatre as well as the share of theatre within the total number of performances. Third, the subsidized performances will be divided from the rest of the performances in order to establish the ratios of subsidized and non-subsidized theatre performances. Finally, any price fluctuations and/or irregularities will be discussed in the final part of this chapter.

## 5.2. Total performances

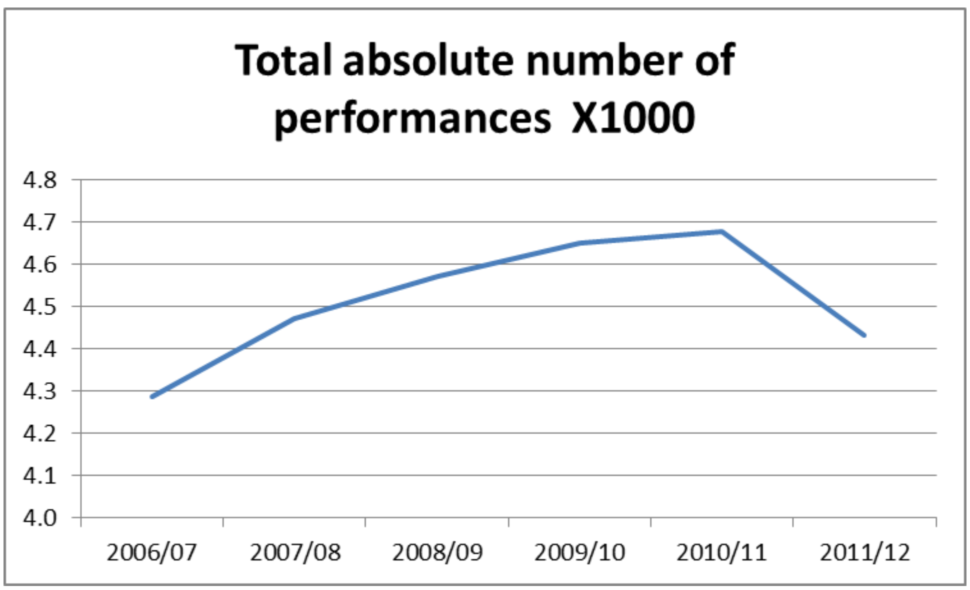
Table 5.1 below illustrates the total number of performances which took place in the twelve selected theaters in the Netherlands during the period of seasons 2006-'07 and 2011-'12. Within this part of the research, all performances of all genres within the theaters have been accumulated. Based on this table, it can be noticed that season 2010-'11 has generated the highest number of performances within the sample, with an absolute number of 4678 performances. Season 2006-'07 displays the lowest amount of performances, namely 4286 performances. The overall generated average number of performances during the period 2006-2012 lies at 4515 performances per season. From season 2006-'07 up to season 2010-'11, an increase can be distinguished in the total number of performances. Season 2011-'12 indicates a decrease in total number of performances with regard to previous seasons.

| | 2006/07 | 2007/08 | 2008/09 | 2009/10 | 2010/11 | 2011/12 |
|---|---|---|---|---|---|---|
| Stadsschouwburg Amsterdam | 219 | 260 | 263 | 354 | 399 | 362 |
| Schouwburg Almere | 221 | 251 | 284 | 300 | 292 | 225 |
| Chassé Theater Breda | 454 | 459 | 494 | 457 | 480 | 368 |
| Keizer Karel Podia Nijmegen | 279 | 269 | 254 | 266 | 275 | 302 |
| Musis Sacrum Schouwburg Arnhem | 469 | 446 | 397 | 421 | 407 | 349 |
| Stadsschouwburg Groningen/ Oosterpoort | 524 | 537 | 542 | 561 | 516 | 447 |
| Parktheater Eindhoven | 298 | 494 | 472 | 407 | 443 | 444 |
| Rotterdamse Schouwburg | 358 | 277 | 388 | 421 | 365 | 378 |
| Theaters Tilburg | 370 | 376 | 367 | 370 | 350 | 346 |
| Podium Twente | 382 | 340 | 338 | 370 | 308 | 371 |
| Stadsschouwburg Utrecht | 411 | 433 | 461 | 441 | 523 | 540 |
| Zaantheater Zaanstad | 301 | 328 | 311 | 283 | 320 | 299 |
| Total | 4286 | 4470 | 4571 | 4651 | 4678 | 4431 |

**Table 5.1:** Total number of performances

Several conclusions can be drawn from this table. Firstly, Stadsschouwburg Amsterdam shows an increase of performances, from 219 performances in 2006-'07 to 399 in season 2010-'11. Subsequent and current season 2011-'12 includes 37 less performances than previous season. However, note that

Stadsschouwburg Amsterdam has opened a second stage in the year of 2009, which has resulted in the vast increase of performances pre and past 2009. Secondly, it can also be noted that Parktheater Eindhoven has opened a third stage in 2007, which could be the cause of the quantitative increase in between seasons 2006-’07 and 2007-’08. Overall, it can be stated that for the majority of the theaters, season 2011-’12 contains the lowest number of performances, in comparison to other seasons within this particular sample. The largest decline in number of performances in between two subsequent seasons can be found at Chassé Theater Breda. Season 2010-’11 included a total of 480 performances, whilst subsequent season 2011-’12 included 368 performances. However, it must also be stated that exceptions do take place. Keizer Karel Podia in Nijmegen, Rotterdamse Schouwburg, Podium Twente and Stadsschouwburg Utrecht all have displayed an increase of performances in 2011-’12 compared to previous season 2010-’11. Even more so, season 2011-’12 contains the highest number of performances at Stadsschouwburg Utrecht during the six theatrical seasons, with a total of 540 performances. The same goes for Keizer Karel Podia in Nijmegen, with a total number of 302 performances.




**Graph 5.2.1.** Total absolute number of performances X1000

Based on the graph before, it can be noticed that from season 2006-’07 onwards, an increase in number of performances per season is distinguishable up to season 2010-’11. Beginning with a total of 4286 performances in 2006-’07, season 2010-’11 includes a peak number of 4678 performances. Only the last season 2011-’12 displays a decrease in total number of performances in the sample, with a total of 4431 performances.

### 5.3. Developments in genre classifications

For every theatre, all performances have been included into eleven main genres. As discussed within previous chapters, some irregularities have occurred within the data collection and processing. As a result, it has been decided to form these main genre classifications. These genres include: light music, world music, music theatre, cabaret, musical/show/entertainment, youth/young theatre, theatre, dance, opera/operetta, classical music and a genre miscellaneous. This latter genre includes performances or other cultural activities which can't be included in the genres mentioned above, such as lectures, introductions and festivals. The figure below in the next paragraph will describe the absolute number of performances per season and respectively genre.

### 5.4. Absolute numbers of performances per genre

What becomes clear from the table below is that the overall average of total performances per season consists of 4515 performances. The season which includes the lowest number of performances is the first season included in this sample, namely season 2006-'07, with a total number of 4286 performances. Season 2010-'11 includes the highest number of performances, a total of 4678 performances. As discussed previously, the total number of performances increases up to up to season 2010-'11, after which a decrease can be noticed in season 2011-'12.

| Development of Genres | 2006/07 | 2007/08 | 2008/09 | 2009/10 | 2010/11 | 2011/12 | Average |
|---|---|---|---|---|---|---|---|
| Popular music | 375 | 421 | 417 | 551 | 500 | 480 | 457 |
| World music | 140 | 142 | 136 | 91 | 59 | 38 | 101 |
| Music Theatre | 33 | 175 | 98 | 71 | 83 | 63 | 87 |
| Cabaret | 565 | 615 | 637 | 629 | 627 | 574 | 608 |
| Musical/show/entertainment | 454 | 495 | 598 | 440 | 614 | 497 | 516 |
| Theatre youth/young | 508 | 469 | 549 | 527 | 524 | 535 | 519 |
| Theatre | 1,149 | 1,148 | 1,070 | 1,199 | 1,100 | 1,136 | 1,134 |
| Dance | 327 | 347 | 338 | 346 | 325 | 340 | 337 |
| Opera/operetta | 116 | 110 | 96 | 96 | 109 | 92 | 103 |
| Classical music | 440 | 428 | 427 | 436 | 378 | 323 | 405 |
| Miscellaneous | 179 | 120 | 205 | 265 | 359 | 353 | 247 |
| Total | 4,286 | 4470 | 4,571 | 4,651 | 4,678 | 4,431 | 4,515 |

**Table 5.4** development of genres during the period 2006-2012 within the twelve selected theatres.

Based on the figure above, each genre will be discussed in order to gain some more insight on any fluctuations within the genres.

#### *5.4.1. Popular music*

What can be noted based on the figure above is that popular music performances lie high above average as for the last three seasons, respectively 2009-'10, 2010-'11 and 2011-'12. Although season 2011-'12 includes less performances than the previous season, the total number lies 23 performances above average of 457 performances per season.

### *5.4.2. World music*

Furthermore, a strong decline can be noticed within the genre of world music, from around 140 performances per season in 2006-’07 and 2007-’08 to only 38 in last season 2011-’12. The total numbers of performances for the genre music theatre vary greatly in between the six seasons. With an average of 87 performances per season, from 33 in season 2006-’07 up to 175 in subsequent season 2007-’08, the only season which includes approximately the same amount of performances is season 2010-’11 with 83 performances.

### *5.4.3. Music theatre*

The overall average for the genre music theatre is 87 performances per season. The highest number of performances can be found in season 2007-’08, with 175 performances, while the lowest number is localized in 2006-’07, with 33 performances. As for most recent season 2011-’12, the total number is 63 performances, 24 performances below average.

### *5.4.4. Cabaret*

As for the genre cabaret, an average has been generated of 608 performances, ranging from 656 performances in 2006-’07 up to 637 performances in 2008-’09. The largest fluctuation can be noticed when a comparison is made between season 2010-’11 and 2011-’12, namely a difference of 53 performances.

### *5.4.5. Musical/show/entertainment*

Within the genre of musical, show and entertainment, the average is 516 performances per season, including the highest number of 614 performances in 2010-’11 and the lowest number of performances in season 209-’10, namely 440 performances. Season 2011-’12 includes 497 performances in this genre, nineteen performances below overall average.

### *5.4.6. Youth/young theatre*

The sixth genre in the figure is youth/young theatre. The overall average number of performances for this particular genre consists of 519 performances per season. The lowest number of performances take place in season 2007-’08, namely 469 performances. The highest number of youth/young theatre performances is 549 performances in the season 2008-’09. Season 2011-’12 includes a total of 535 performances within this genre, 16 above average.

### *5.4.7. Theatre*

With an average of 1134 performances per season, season 2008-'09 displays the lowest number of performances within the genre theatre, namely 1070 performances. The highest number of theatre performances is 1199 performances, which can be found in season in following season 2009-'10. As for the last included season in the sample, the total number of performances lies closest to the overall average, with a total of 1136 performances.

#### *5.4.8. Dance*

The eighth discussed genre is dance, with an average of 337 performances per season, doesn't show any major fluctuations during the selected period of time. The highest number of performance has taken place in season 2007-'08 with 347 performances, whereas the lowest number of dance performance can be distinguished in season 2010-'11, namely 325 performances.

#### *5.4.9. Opera/operetta*

Furthermore, opera/operetta as a genre has an overall average of 103 performances during the six included seasons. The highest number of performances has taken place in the first included season 2006-'07, namely 116 performances. The lowest number of performances can be found in season 2011-'12, with a total of 92 performances. From 2006-'07 onwards, a decline can be noticed within this particular genre, with the exception of season 2010-'11, in which a minor peak can be seen.

#### *5.4.10. Classical music*

Classical music performances have established an overall average of 405 performances. The highest number of performances can be found in season 2006-'07, with a total of 440 performances, whereas the lowest number of performances takes place in season current season 2011-'12. From season 2006-'07 onwards, a decline in the absolute number of performances can be noticed, with the exception of season 2009-'10.

#### *5.4.11. Miscellaneous*

Finally, the overall trend as for the miscellaneous activities, a strong growth can be distinguished, which is amongst other factors, due to the festivals organized by Stadsschouwburg Utrecht and Stadsschouwburg Amsterdam, as can be noticed based on the additional information in the annexes of this research.

### **5.5. Relative numbers of performances per genre per season**

#### *5.5.1. Introduction*

After discussing the absolute numbers of performances per genre and season, attention will be paid to the relative shares of the genres per season. The table below will include and demonstrate these shares per genre per season. The figure aspires to give more insight on the composition of performances per genre for every season. In this way, fluctuations can be established. For every season, it will be determined which genres represent the highest and lowest share within the season, with one (1) being the overall total of performances.

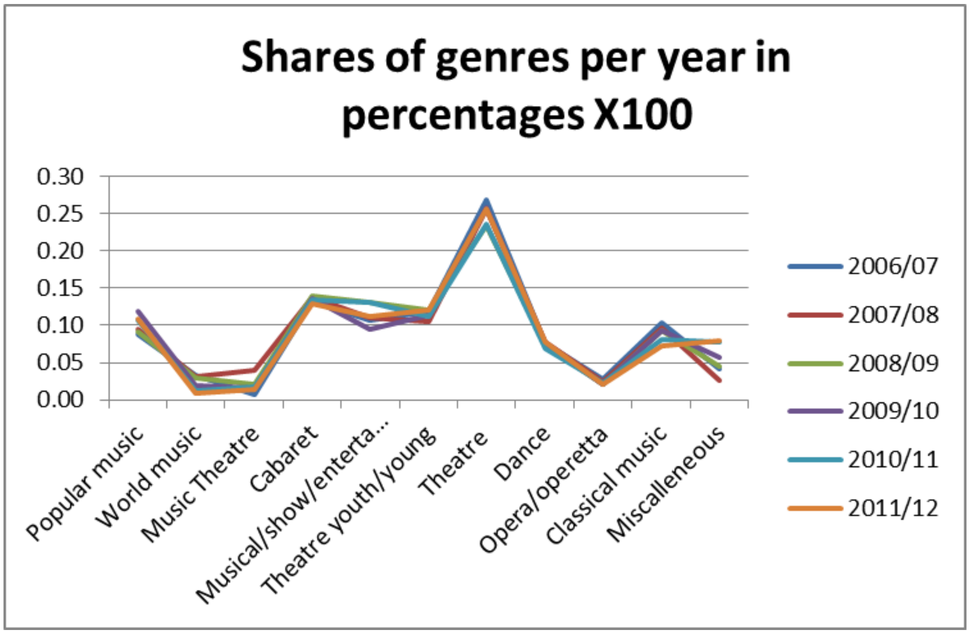



**Figure 5.5** Shares per genre during 2006-2012 in percentages X100

Overall, what can be concluded from this figure is that the genre theatre includes the highest share in all seasons of the total performances during the period 2006-2012 in the included theatres. Following theatre, the genres cabaret, popular music, musical/show/entertainment, and theatre young/youth are also popular genres throughout the seasons. Genres which are programmes least during this particular period are world music, music theatre, and opera/operetta. The following paragraph will discuss the shares per genre per season more in detail in order to give even more insight of the relative shares per genre per season.

*5.5.2. Relative shares per genre per season*

The table below will generate information on the relative shares per genre per season in order to gain more perspective on the composition of genres per season. In this respect, fluctuations will be noticeable which lead to conclusions on this composition of genres per season. The following seven sub paragraphs will discuss these genre compositions per season in order to draw conclusions in paragraph 5.5.9.

| Genre | 2006/07 | 2007/08 | 2008/09 | 2009/10 | 2010/11 | 2011/12 |
|---|---|---|---|---|---|---|
| Light music | 0.09 | 0.09 | 0.09 | 0.12 | 0.11 | 0.11 |
| World music | 0.03 | 0.03 | 0.03 | 0.02 | 0.01 | 0.01 |
| Music Theatre | 0.01 | 0.04 | 0.02 | 0.02 | 0.02 | 0.01 |
| Cabaret | 0.13 | 0.14 | 0.14 | 0.14 | 0.14 | 0.13 |
| Musical/show/entertainment | 0.11 | 0.11 | 0.13 | 0.10 | 0.13 | 0.12 |
| Theatre youth/young | 0.12 | 0.10 | 0.12 | 0.12 | 0.12 | 0.12 |
| Theatre | 0.27 | 0.26 | 0.23 | 0.23 | 0.22 | 0.24 |
| Dance | 0.08 | 0.08 | 0.07 | 0.08 | 0.07 | 0.08 |
| Opera operetta | 0.03 | 0.02 | 0.02 | 0.02 | 0.02 | 0.02 |
| Classical music | 0.10 | 0.10 | 0.09 | 0.10 | 0.08 | 0.07 |
| Miscellaneous | 0.04 | 0.03 | 0.04 | 0.06 | 0.08 | 0.08 |
| | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 |

**Table 5.5** Relative shares per genre in comparison to total performances, with one (1) being the total of 100%.

### *5.5.3. Season 2006-‘07*

The largest share of performances in season 2006-’07 is represented by theatre performances, with a percentage of 27%, followed by cabaret, 13% and youth/young theatre, 12%. The lowest shares include music theatre with a percentage of 1, followed by world music and opera/operetta, both with a percentage of 3 of the total.

### *5.5.4. Season 2007-‘08*

Next, the genre with the largest share in season 2007-’08 is again theatre, with 26% of the total. Cabaret with 14% and musical, show and entertainment, 11% follow. The smallest shares include 2% for opera/operetta, 3% for both world music as well as miscellaneous performances and other activities.

### *5.5.5. Season 2008-‘09*

Furthermore, in the subsequent season 2008-’09, genre theatre has the largest share of performances, with 23%. After theatre, cabaret takes up 14% of the total performances, followed by musical, show and entertainment with 13%. As for the genres with the smallest share in this season, both genre opera/operetta as well as music theatre have a share of 2% on the total performances. World music follows with 3%.

### *5.5.6. Season 2009-‘10*

The shares in season 2009-’10 as divided as follows. The genre theatre takes up the largest share of performances, with a total share of 23%, which is followed by cabaret with 14% and 12% for both youth/young theatre as well as popular music. The smallest shares of 2% are taken up by three genres, respectively world music, music theatre and opera/operetta.

### *5.5.7. Season 2010-'11*

Subsequently, within season 2010-'11, genre theatre yet again takes up the largest share with 22%. Cabaret follows with 14%, after which musical, show and entertainment takes up the third position. As for the smallest shares, 1% of the performances are due to world music performances. Finally, both music theatre as well as opera/operetta includes 2% of the total number of performances.

### *5.5.8. Season 2011-'12*

To end with season 2011-'12, the largest share is filled by theatre performances with 24%, second cabaret with a share of 13% and musical, show and entertainment as well as youth/young theatre with 12%. The smallest shares can be found in music theatre and world music with both a share of 1%, followed by opera/operetta with 2%.

### *5.5.9. Summary*

Overall, it can be stated that the two largest shares within these seasons are taken up by theatre and cabaret. The interpretation of the third largest share fluctuates somewhat in between seasons, respectively youth/young theatre, musical, show and entertainment and popular music. Focusing on the smallest shares of genres, world music, music theatre and opera/operetta can be considered being the least popular genres.

## 5.6. Genre theatre

### *5.6.1. Absolute numbers of theatre performances*

As stated previously, the genre theatre has been selected with the aim of further research, due to the fact that this particular genre includes the highest number of performances per season. Therefore, the table below illustrates the absolute volume of theatre performances within the total performances. As can be stated based from the table below, season 2009-'10 contained the highest absolute number of performances within the genre theatre, with a total of 1199 performances. With a total of 1070, season 2008-'09 includes the lowest absolute number of performances.

| Genre Theater | 2006/07 | 2007/08 | 2008/09 | 2009/10 | 2010/11 | 2011/12 | Total |
|---|---|---|---|---|---|---|---|
| Stadsschouwburg Amsterdam | 149 | 145 | 147 | 210 | 210 | 214 | *1075* |
| Schouwburg Almere | 36 | 44 | 42 | 46 | 35 | 33 | *236* |
| Chassé Theater Breda | 104 | 107 | 110 | 80 | 80 | 49 | *530* |
| Keizer Karel  Podia Nijmegen | 25 | 27 | 20 | 29 | 28 | 79 | *208* |
| Musis Sacrum Schouwburg Arnhem | 141 | 129 | 112 | 113 | 108 | 97 | *700* |
| Stadsschouwburg Groningen/ Oosterpoort | 128 | 131 | 135 | 147 | 115 | 107 | *763* |
| Parktheater Eindhoven | 70 | 108 | 77 | 103 | 73 | 85 | *516* |
| Rotterdamse Schouwburg | 193 | 187 | 185 | 160 | 169 | 176 | *1070* |
| Theaters Tilburg | 72 | 72 | 50 | 55 | 55 | 59 | *363* |
| Podium Twente | 38 | 27 | 26 | 43 | 28 | 25 | *187* |
| Stadsschouwburg Utrecht | 157 | 133 | 128 | 179 | 164 | 167 | *928* |
| Zaantheater Zaanstad | 36 | 38 | 38 | 34 | 35 | 45 | *226* |
| Total | 1149 | 1148 | 1070 | 1199 | 1100 | 1136 | **6802** |

**Table 5.6** Absolute numbers of performances within genre theatre during period 2006-2012 within selected theatres.

The table above illustrates that Stadsschouwburg Amsterdam generates the highest absolute number of theatre performances, ranging from 145 in season 2008-’09 to 214 theatre performances in season 2011-‘12, with a total of 1075 theatre performances during these six selected seasons. Stadsschouwburg Amsterdam is followed by Rotterdamse Schouwburg, with a total of 1070 performances classified as genre theatre, varying from 160 in season 2009-’10 to 193 theatre performances in season 2006-’07. Furthermore, Rotterdamse Schouwburg  is followed by Stadsschouwburg Utrecht, with a range from 128 performances in season 2008-’09 to 179 performances in 2009-’10 and a total of 928 performances within this particular season.  The three theatres with the lowest absolute number of theatre performances are Podium Twente, with a total of 187 performances, ranging from 25 performances in season 2011-’12 to 43 performances in 2009-’10; Zaantheater, with a total of 226 performances, varying from 34 theatre performances in 2009-’10 to 45 performances in 2011-’12 and thirdly Schouwburg Almere, with a range from 33 performances in 2011-’12 to 46 theatre performances in 2009-’10.

### *5.6.2. Relative shares of theatre performances*

Furthermore, the table below indicates the overall seasonal average share of theatre performances with one (1) representing 100%. As a result, the average of theatre performances within the total performances lies approximately around 25%, as can been noted in the table below. Of course, percentages fluctuate widely within the theatres, from only 7% of the total performances in season 2011-’12 at Podium Twente, to 68% in season 2007-’08 at Rotterdamse Schouwburg.

| Share genre theatre in total performances | 2006/07 | 2007/08 | 2008/09 | 2009/10 | 2010/11 | 2011/12 | Average |
|---|---|---|---|---|---|---|---|
| Stadsschouwburg Amsterdam | 0.68 | 0.56 | 0.56 | 0.59 | 0.53 | 0.59 | 0.58 |
| Schouwburg Almere | 0.16 | 0.18 | 0.15 | 0.15 | 0.12 | 0.15 | 0.15 |
| Chassé Theater Breda | 0.23 | 0.23 | 0.22 | 0.18 | 0.17 | 0.13 | 0.19 |
| Keizer Karel Podia Nijmegen | 0.09 | 0.10 | 0.08 | 0.11 | 0.10 | 0.26 | 0.12 |
| Musis Sacrum Schouwburg Arnhem | 0.30 | 0.29 | 0.28 | 0.27 | 0.27 | 0.28 | 0.28 |
| Stadsschouwburg Groningen/ Oosterpoort | 0.24 | 0.24 | 0.25 | 0.26 | 0.22 | 0.24 | 0.24 |
| Parktheater Eindhoven | 0.23 | 0.22 | 0.16 | 0.25 | 0.16 | 0.19 | 0.20 |
| Rotterdamse Schouwburg | 0.54 | 0.68 | 0.48 | 0.38 | 0.46 | 0.47 | 0.50 |
| Theaters Tilburg | 0.19 | 0.19 | 0.14 | 0.15 | 0.16 | 0.17 | 0.17 |
| Podium Twente | 0.10 | 0.08 | 0.08 | 0.12 | 0.09 | 0.07 | 0.09 |
| Stadsschouwburg Utrecht | 0.38 | 0.31 | 0.28 | 0.41 | 0.31 | 0.31 | 0.33 |
| Zaantheater Zaanstad | 0.12 | 0.12 | 0.12 | 0.12 | 0.11 | 0.15 | 0.12 |
| Average per season | 0.27 | 0.26 | 0.23 | 0.26 | 0.24 | 0.26 | 0.25 |

**Table 5.6.2**. Share genre theatre of total performances

Previously in this paragraph, it has been stated that Stadsschouwburg Amsterdam included the highest absolute number of theatre performances (1075 performances), followed by Rotterdamse Schouwburg (1070 performances) and Stadsschouwburg Utrecht (928 performances). Based on the table above, several conclusions can be drawn. The highest share of theatre performances is generated within Stadsschouwburg Amsterdam, with an average share of 58% of the total performances, which is constituted from a range from 53% in season 2010-’11 up to 68% in 2006-’07. Secondly, the Rotterdamse Schouwburg holds an average share of 50% theatre performances within the program. This average is generated from a range of 38% in 2009-’10 up to 68% in 2007-’08. Following both Stadsschouwburg Amsterdam and Stadsschouwburg Rotterdam is Stadsschouwburg Utrecht, which enables an average share of 33% theatre performances, varying from 28% in season 2008-’09 to 41% in season 2009-’10. The lowest shares can be found in Podium Twente, Zaantheater and Keizer Karel Podia Nijmegen. Podium Twente includes the lowest percentage, with an average share of 9% theatre performances within the total number of performances, ranging from 7% in season 2011-’12 to 12% in season 2009-’10. Following Podium Twente are Zaantheater and Keizer Karel Podia Nijmegen, both with an average of 12% theatre performances. The range of Zaantheater lies between 11% in both 2007-’08 and 2010-’11 and 15% in season 2011-’12. The share theatre performances at Keizer Karel Podia Nijmegen varies more greatly, namely from 7% in 2008-’09 up to 25% in season 2011-’12.

## 5.7. General: distributed subsidies

### *5.7.1. Absolute number of subsidized theatre performances*

After defining both the absolute and relative shares of theatre performances within the twelve selected theatres during these six theatrical seasons, the focus now lies on the number of subsidized performances within the genre theatre. This will be done in order to establish whether or not flattening occurs within the performing arts sector in the Netherlands, while in particular focusing on the genre theatre. Overall, based on the table below, it can be stated that the average of subsidized theatre performances lies at 712 performances. This indicates that season 2008-’09 included the lowest absolute number of subsidized theatre performances, namely 672 performances, while the highest absolute number of 761 performances can be found in subsequent season 2009-’10.

| Subsidized theatre performances | 2006/07 | 2007/08 | 2008/09 | 2009/10 | 2010/11 | 2011/12 |
|---|---|---|---|---|---|---|
| Stadsschouwburg Amsterdam | 128 | 121 | 122 | 166 | 175 | 184 |
| Svhouwburg Almere | 15 | 16 | 15 | 29 | 18 | 10 |
| Chassé Breda | 53 | 59 | 58 | 49 | 42 | 29 |
| Keizer Karel  Podia Nijmegen | 8 | 8 | 4 | 9 | 7 | 32 |
| Musis Sacrum Schouwburg Arnhem | 83 | 75 | 77 | 71 | 64 | 60 |
| Stadsschouwburg Groningen/Oosterpoort | 91 | 67 | 79 | 92 | 73 | 72 |
| Parktheater Eindhoven | 46 | 64 | 43 | 59 | 41 | 51 |
| Rotterdamse Schouwburg | 145 | 127 | 151 | 115 | 130 | 135 |
| Theaters Tilburg | 30 | 35 | 22 | 25 | 27 | 29 |
| Podium Twente | 14 | 10 | 13 | 16 | 9 | 7 |
| Stadsschouwburg Utrecht | 108 | 90 | 71 | 120 | 104 | 102 |
| Zaantheater Zaanstad | 12 | 10 | 17 | 10 | 12 | 13 |
| Total | 733 | 682 | 672 | 761 | 702 | 724 |

**Table 5.7.1**: Absolute numbers of subsidized theatre performances during 2006-2012 within selected theatres.

As for the individual theatres, it becomes clear that the theatres of the three largest cities include the highest absolute numbers of subsidized theatre performances, namely Stadsschouwburg Amsterdam, Rotterdamse Schouwburg and Stadsschouwburg Utrecht. Stadsschouwburg Amsterdam generates an average of 149 subsidized performances, with a range between 121 in season 2007-’08 and 184 in season 2011-’12. Secondly, Rotterdamse Schouwburg contains a variety of 115 subsidized performances in 2009-’10 up to 151 in season 2008-’09, establishing an average of 134 performances, which is one performance below season 2011-’12. Stadsschouwburg Amsterdam and Rotterdamse Schouwburg are followed by Stadsschouwburg Utrecht, which encloses an average of 99 subsidized performances during the six seasons. The lowest number of subsidized performances of 71 performances can be located in season 2008-’09, while subsequent season 2009-’10 includes the highest number of subsidized performances of 120. As for the lowest numbers of subsidized performances, Keizer Karel Podia Nijmegen included the least amount of subsidized theatre performances, ranging from four performances in 2008-’09 to 32 performances in season 2011-’12, creating an average of 11 subsidized performances.

Podium Twente and Zaantheater both scored an average of 12 subsidized theatre performances. The absolute number at Podium Twente is varying from 7 performances in season 2011-'12 to 16 in season 2009-'10. With regard to Zaantheater, the range rests between 10 subsidized performances in both seasons 2007-'08 as well as season 2009-'10 and 17 performances in 2008-'09.

### *5.7.2. Relative numbers of subsidized theatre performances per theatre*

After discussing the absolute numbers of subsidized performances, the focus will be shifted towards relative numbers of subsidized performances. Overall, the lowest share of subsidized theatre performances can be located within season 2007-'08, with an average of 61%. This average number is generated by the variety of 28% subsidized theatre performances in Zaantheater up to 88% at Stadsschouwburg Amsterdam. The highest average lies at 66%, located in season 2010-'11, varying from 26% at Keizer Karel Podia Nijmegen to 90% in Amsterdam.

| Subsidized theatre performances | 2006/07 | 2007/08 | 2008/09 | 2009/10 | 2010/11 | 2011/12 |
|---|---|---|---|---|---|---|
| Stadsschouwburg Amsterdam | 0,91 | 0,88 | 0,88 | 0,84 | 0,90 | 0,87 |
| Schouwburg Almere | 0,43 | 0,38 | 0,38 | 0,63 | 0,51 | 0,30 |
| Chassé Theater Breda | 0,51 | 0,55 | 0,53 | 0,61 | 0,53 | 0,59 |
| Keizer Karel Podia Nijmegen | 0,33 | 0,31 | 0,21 | 0,32 | 0,26 | 0,42 |
| Musis Sacrum Schouwburg Arnhem | 0,67 | 0,64 | 0,79 | 0,69 | 0,68 | 0,71 |
| Oosterpoort/Stadsschouwburg Groningen | 0,71 | 0,51 | 0,59 | 0,63 | 0,63 | 0,67 |
| Parktheater Eindhoven | 0,66 | 0,59 | 0,56 | 0,57 | 0,56 | 0,60 |
| Rotterdamse Schouwburg | 0,75 | 0,68 | 0,82 | 0,72 | 0,77 | 0,77 |
| Theaters Tilburg | 0,42 | 0,49 | 0,44 | 0,45 | 0,49 | 0,49 |
| Podium Twente | 0,37 | 0,38 | 0,50 | 0,37 | 0,32 | 0,28 |
| Stadsschouwburg Utrecht | 0,69 | 0,68 | 0,55 | 0,67 | 0,63 | 0,61 |
| Zaantheater Zaanstad | 0,33 | 0,28 | 0,45 | 0,29 | 0,34 | 0,29 |
| Total | 0,65 | 0,61 | 0,64 | 0,65 | 0,66 | 0,65 |

**Table 5.7.1.** Relative shares of subsidized theatre performances during 2006-2012 in the selected theatres.

Stadsschouwburg Amsterdam, Rotterdamse Schouwburg and Musis Sacrum Schouwburg Arnhem represent the three theatres with the highest averages of subsidized theatre performances. The highest share is generated by Stadsschouwburg Amsterdam, namely 88%, constructed from a range from 84% in 2009-'10 to 91%. Season 2011-'12 includes an average of 87%, 1% below average. Secondly, Rotterdamse Schouwburg holds an average of 75% subsidized performances, based on a range from 68% in season in 2007-'08 up to 82% in 2009-'10. The most recent season 2011-'12 includes 77% subsidized theatre performances, 2% above overall average. Based on previous tables, one could expect the theatre from the second largest city in the sample to fill up the third position when it comes to the share of subsidized performances. However, with a share of 70% subsidized theatre performances, Musis Sacrum Schouwburg Arnhem holds the third place. The lowest share of 64% can be located in season 2007-'08, while the highest share of 79% takes place in subsequent season 2008-'09. The theatres with the lowest average shares of subsidized theatres performances are Keizer Karel Podia Nijmegen, Zaantheater and Podium Twente. Keizer Karel Podia Nijmegen has generated a share of 31% subsidized theatre performances, based on a range from 21% in season 2008-'09 to 42% in season 2011-'12. Zaantheater has an average share of 33% subsidized theatre performances, which is constituted from shares of 28% in season 2007-'08 up to 45% in subsequent season 2008-'09. Third, Podium Twente contains an overall average of 37%, which is generated from 28% in season 2011-'12 to 50% in 2008-'09.

### *5.7.3. Distribution of subsidies*

The table below illustrates the various levels from which the subsidies were distributed in the six selected theatrical seasons more in detail. As can be concluded from this table, most subsidies are generated by the State and Fonds voor de Podiumkunsten. What also can be derived from the table is the number of excluded theatre performances, namely music theatre performances within the genre of theatre and foreign theatre performances.

Overview subsidies

| | 2006/07 | 2007/08 | 2008/09 | 2009/10 | 2010/11 | 2011/12 |
|---|---|---|---|---|---|---|
| S1 State subsidies | 724 | 660 | 511 | 502 | 454 | 505 |
| S2 Fund subsidies | 3 | 5 | 143 | 218 | 220 | 185 |
| S3Province subsidies | 5 | 17 | 15 | 38 | 20 | 24 |
| S4 City subsidies | 1 | 0 | 3 | 3 | 8 | 10 |
| Total subsidized theatre performances | 733 | 682 | 672 | 761 | 702 | 724 |
| Foreign | 85 | 116 | 96 | 117 | 98 | 81 |
| Music Theater | 8 | 4 | 12 | 11 | 31 | 13 |
| sub total | 93 | 120 | 108 | 128 | 129 | 94 |
| Unsubsidized theatre performances | 289 | 314 | 263 | 286 | 239 | 290 |
| Miscellaneous | 7 | 7 | 0 | 0 | 0 | 11 |
| Total | 1,122 | 1,123 | 1,043 | 1,175 | 1,070 | 1,119 |
| Share subsidized | 0,65 | 0,61 | 0,64 | 0,65 | 0,66 | 0,65 |

**Table 5.7.3**. Overview absolute subsidized theatre performances per level of subsidizing

## 5.8. Pricing

### *5.8.1. General*

As stated previously, eight subsidized theatre companies have been selected in order to establish the potential existence of fluctuations in ticket prices. These selected theatre companies are Het Nationaal Toneel, Het Zuidelijk Toneel, Noord Nederlands Toneel, Paardenkathedraal, RO Theater, Theatergroep Het Vervolg, Toneelgroep Amsterdam and Toneelgroep Oostpool.

Based on Culture Notes of both 2005-2008 as well as 2009-2012, these eight theatre companies represent the highest level on continuity which is needed to make any type of comparison. During the period of these Culture Notes, these eight theatre companies are the only theatre companies that appear in both Culture Notes. Even more so, as for the most recent Culture Note of 2009-2012, these eight companies are the only theatre companies and groups included.

The following tables below displays the average ticket prices within the twelve selected theatres within the entire selected period of 2006-2012 per theatrical season. For each season, several values will be highlighted in order to gain perspective of price fluctuations over time. The majority of the twelve selected theatres within this research have generated price differentiation within their pricing mechanisms. Therefore, each price and rank will be discussed separately, in order to generate as much information regarding these ticket prices as possible. Theater which has generated the highest level of price discriminations is Chassé Theater Breda, with the visitor's option to choose from six different ranges in both seasons 2009-'10 and 2011-'12. However, the sample has also shown that some theatres do not incorporate any price differentiation at all during this period, which can be seen at both Podium Twente as well as Zaantheater.

### *5.8.2. First rank*

| | 2006/07 | 2007/08 | 2008/09 | 2009/10 | 2010/11 | 2011/12 |
|---|---|---|---|---|---|---|
| Stadsschouwburg Amsterdam | 24.3 | 24.0 | 27.5 | 27.2 | 26.7 | 30.7 |
| Schouwburg Almere | 17.5 | 18.1 | 19.3 | 22.5 | 23.0 | 22.9 |
| Chassé Theater Breda | 22.6 | 23.1 | 22.9 | 29.1 | 28.7 | 34.2 |
| Keizer Karel Podia | 19.1 | 18.9 | 20.0 | 20.6 | 22.2 | 23.9 |
| Musis Sacrum Schouwburg Arnhem | 18.0 | 18.0 | 18.0 | 20.0 | 22.2 | 27.5 |
| Stadsschouwburg Groningen/Oosterpoort | 20.3 | 21.6 | 20.9 | 22.0 | 22.7 | 24.4 |
| Parktheater Eindhoven | 19.0 | 19.4 | 22.0 | 23.5 | 25.5 | 32.2 |
| Rotterdamse Schouwburg | 17.9 | 20.6 | 20.6 | 25.0 | 25.3 | 34.4 |
| Theaters Tilburg | 18.6 | 19.7 | 19.5 | 27.0 | 22.8 | 24.8 |
| Podium Twente | 18.3 | 17.5 | 22.5 | 22.0 | 0.0 | 28.4 |
| Stadsschouwburg Utrecht | 20.8 | 20.3 | 19.9 | 23.2 | 21.5 | 26.9 |
| Zaantheater | 19.3 | 20.0 | 19.0 | 21.5 | 23.2 | 27.0 |
| Overall average ticket price | 19.6 | 20.1 | 21.0 | 23.6 | 24.0 | 28.1 |

**Table 5.8.2.** Average ticket prices of first rank during period 2006-2012 within twelve selected theatres

Based on the table above, the prices of the first rank within the twelve selected theatres and six selected seasons will be discussed.

Season 2006-'07

Average prices within season 2006-'07 fluctuate between €18.00 at Musis Sacrum Schouwburg Arnhem and €24.30 at Stadsschouwburg Amsterdam, while the overall average price lies at €19.60. Closest to this overall average are the ticket prices at Zaantheater, with €19.30.

Season 2007-'08

The ticket prices within subsequent season 2007-’08 has generated an overall average ticket price of €20.10. The theatre with the highest ticket prices is Stadsschouwburg Amsterdam with an average ticket price of €24.00, while the lowest value can be granted to podium Twente, with a ticket price of €17.50 averagely. Just like previous season, ticket prices at Zaantheater are closest to the average, namely €20.00.

Season 2008-‘09

With an overall average of €21.00 per ticket, Stadsschouwburg Amsterdam again includes the highest ticket prices within the sample, with an average of €27.50. The lowest ticket price of €18.00 can be found at Musis Sacrum Schouwburg Arnhem. Ticket prices at Stadsschouwburg Groningen/Oosterpoort are closest to the average, namely €19.90 per ticket.

Season 2009-‘10

The values within season 2009-’10 range from €20.00 per ticket at Stadsschouwburg Groningen/Oosterpoort up to €29.10 per ticket at Chassé Theater Breda, while the overall ticket price is situated at €23.60. This is closest to the ticket prices at Parktheater Eindhoven, where the overall ticket price €23.50.

Season 2010-‘11

With an average of €24.00 per ticket, ticket prices of four theatres within the sample lie above this average, with Chasse Theater Breda generating the highest value of €28.70 per ticket. The lowest value can be seen at Stadsschouwburg Utrecht, with an average ticket price of €21.50. Note that Podium Twente doesn’t include any performances of these eight selected theatre groups and companies this season and thereby generating a value of €0.00. With a ticket price of €23.20 per ticket, ticket prices at Zaantheater lie closest to the overall average.

Season 2011-‘12

Within season 2011-’12, a range from €22.90 at Schouwburg Almere to €34.40 per ticket at Rotterdamse Schouwburg can be distinguished. In addition, the overall average lies at €28.10 per ticket, which is surpassed by five theatres. The theatre which includes ticket prices closest to the overall average is Podium Twente with a ticket price of €28.40 per ticket.

### *5.8.3. Overall price developments first rank*

Furthermore, the following table will display overall average price escalation with regard to the first rank ticket prices from season 2006-’07 to 2007-’08. In this respect, it can be established whether or not the price increases have occurred gradually. The six seasons will be discussed separately, as was done with the previous table.

| | 2007/08 | 2008/09 | 2009/10 | 2010/11 | 2011/12 |
|---|---|---|---|---|---|
| Stadsschouwburg Amsterdam | 0.99 | 1.15 | 0.99 | 0.98 | 1.15 |
| Schouwburg Almere | 1.04 | 1.06 | 1.17 | 1.02 | 0.99 |
| Chassé Theater Breda | 1.02 | 0.99 | 1.27 | 0.99 | 1.19 |
| Keizer Karel Podia | 0.99 | 1.06 | 1.03 | 1.08 | 1.07 |
| Musis Sacrum Schouwburg Arnhem | 1.00 | 1.00 | 1.11 | 1.11 | 1.24 |
| Stadsschouwburg Groningen/Oosterpoort | 1.07 | 0.97 | 1.05 | 1.03 | 1.07 |
| Parktheater Eindhoven | 1.02 | 1.13 | 1.07 | 1.09 | 1.26 |
| Rotterdamse Schouwburg | 1.15 | 1.00 | 1.21 | 1.01 | 1.36 |
| Theaters Tilburg | 1.06 | 0.99 | 1.38 | 0.85 | 1.08 |
| Podium Twente | 0.96 | 1.29 | 0.98 | 0.00 | 0.00 |
| Stadsschouwburg Utrecht | 0.98 | 0.98 | 1.16 | 0.93 | 1.25 |
| Zaantheater | 1.04 | 0.95 | 1.13 | 1.08 | 1.17 |
| Overall price developments | 1.02 | 1.05 | 1.12 | 1.01 | 1.17 |

**Table 5.8.3**. Average price development of first rank during period 2006-2012 within twelve selected theatres

Season 2007-'08

The overall price increase is minimal with 2%. The largest price increase in season 2007-'08 in comparison to season 2006-'07 can be located at Rotterdamse Schouwburg, with a ticket price increase of 15%. Podium Twente hasn't experienced any growth for the height of the ticket prices, but a decrease of 4% instead. Ticket price increase at both Chassé Theater Breda as well as Parktheater Eindhoven matches the overall increase of 2%.

Season 2008-'09

Averagely, ticket prices have increased 5% when comparing season 2008-'09 to season 2007-'08, from a decrease of 5% at Zaantheater up to an increase of 29% at Podium Twente. The ticket price increase at Schouwburg Almere lies closest to the overall ticket price increase, with an average of 6%.

Season 2009-'10

With an overall average increase of 12%, six theatres have shown a higher increase. Theaters Tilburg displays the highest increase of 38% in comparison to previous season. Ticket prices at Podium Twente are generating a decrease of 2%. Closest to the 12% increase lie both Musis Sacrum Schouwburg Arnhem, with 11% and Zaantheater with a 13% ticket price increase.

Season2010-'11

This season represents the lowest increase during the selected period, namely an increase of 1%. Furthermore, the range lies between a ticket price increase of 11% at Musis Sacrum Schouwburg Arnhem and a decrease of 15% at Theaters Tilburg, which is the theatre that has shown the highest growth in previous season. Rotterdamse Schouwburg is displaying the same ticket price increase as the overall average, namely 1%.

Season 2011-'12

The overall ticket price increase within this season in comparison to previous season is 17%. The highest increase of 38% can be distinguished at Rotterdamse Schouwburg, while Schouwburg Almere is the only theatre which is displaying a decrease of 1%. The height of the ticket price increase at Zaantheater is the same as the overall average ticket price increase.

### *5.8.4. Second rank*

The table below displays the second highest ticket prices averagely for the twelve selected Dutch theatres and six seasons. As can be stated based on the table, several theatres don't include price differentiation within the pricing systems. Below, the theatre seasons will be discussed separately, in which price differentiation will be brought to the attention as well as the overall average ticket price per theatre.

| | 2006/07 | 2007/08 | 2008/09 | 2009/10 | 2010/11 | 2011/12 |
|---|---|---|---|---|---|---|
| Stadsschouwburg Amsterdam | 20.3 | 20.0 | 23.5 | 23.4 | 20.8 | 24.9 |
| Schouwburg Almere | 0.0 | 0.0 | 0.0 | 20.0 | 20.5 | 20.4 |
| Chassé Theater Breda | 15.7 | 16.1 | 16.1 | 25.3 | 25.7 | 29.9 |
| Keizer Karel Podia | 20.0 | 20.0 | 20.0 | 20.0 | 22.0 | 0.0 |
| Musis Sacrum Schouwburg Arnhem | 14.0 | 14.0 | 14.1 | 16.0 | 18.2 | 23.5 |
| Stadsschouwburg Groningen/Oosterpoort | 17.4 | 18.6 | 18.2 | 19.2 | 19.7 | 21.3 |
| Parktheater Eindhoven | 17.5 | 16.9 | 19.5 | 20.5 | 23.0 | 27.9 |
| Rotterdamse Schouwburg | 15.0 | 17.3 | 17.3 | 0.0 | 22.6 | 31.4 |
| Theaters Tilburg | 0.0 | 0.0 | 0.0 | 24.0 | 19.7 | 22.4 |
| Podium Twente | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 23.5 |
| Stadsschouwburg Utrecht | 16.8 | 16.3 | 16.0 | 19.0 | 17.8 | 22.9 |
| Zaantheater | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Overall average ticket price | 17.1 | 17.4 | 18.1 | 20.8 | 21.0 | 24.8 |

**Table 5.8.4**. Average ticket prices of second rank during period 2006-2012 within twelve selected theatres

Season 2006-'07

The range of ticket prices within this season is situated between €14.00 per ticket at Musis Sacrum Schouwburg Arnhem and €20.30 at Stadsschouwburg Amsterdam, establishing an overall average of €17.10. Closest to this value lay the ticket prices of Stadsschouwburg Groningen/Oosterpoort with €17.40 per ticket and Stadsschouwburg Utrecht with €16.80 per ticket. As for price differentiation in this particular season, several theatres to not implement price differentiation in the pricing systems, including Schouwburg Almere, Theatres Tilburg, Podium Twente and Zaantheater.

Season 2007-'08

With an overall average ticket price of €17.40 per ticket, both Stadsschouwburg Amsterdam and Chasse Theater Breda as displaying the highest ticket price of €20.00. The lowest ticket price of €14.00 can once again be found at Musis Sacrum Schouwburg Arnhem. The average ticket price of €17.30 at Rotterdamse Schouwburg lies closest to the overall average. With regard to price differentiation, it can be stated that theatres Schouwburg Almere, Theaters Tilburg, Podium Twente and Zaantheater still don't implement price differentiation within the pricing system.

Season 2008-'09

Within this season, a range from €14.10 at Musis Sacrum Schouwburg Arnhem up to €23.50 at Stadsschouwburg Amsterdam can be distinguished. This results in an overall average ticket price of €18.10, which lies closest to the average ticket price of €18.20 at Stadsschouwburg Groningen/Oosterpoort. As can also be stated from two previous seasons, Schouwburg Almere, Theaters Tilburg, Podium Twente and Zaantheater still don't display price differentiation.

Season 2009-'10

The average ticket price of the second price in this season is located at €20.80 per ticket, which is constituted from a range between €16.00 at Musis Sacrum Schouwburg Arnhem and €25.30 at Chasse Theater Breda. With an average ticket price of €20.50, Parktheater Eindhoven generates the average ticket price closest to the overall average. As for the price differentiation, it can be noted that Schouwburg Almere has started price differentiation from this season on as well as Theaters Tilburg, while Podium Twente and Zaantheater still don't. [25]

Season 2010-'11

With an overall average ticket price of €21.00 it can be noted that the lowest ticket price of €17.80 can be found at Stadsschouwburg Utrecht, while the highest ticket price of €25.70 can be found at Chasse theater Breda. Average ticket price of €20.80 at Stadsschouwburg Amsterdam displays the value closest to the overall average. Furthermore, price differentiation is embedded by all theatres, with the exception of Podium Twente and Zaantheater.

Season 2011-'12

A range from €20.40 per ticket at Schouwburg Almere to €31.40 at Rotterdamse Schouwburg has resulted in an overall average ticket price of €24.80. Closest to this value is the average ticket price at Stadsschouwburg Amsterdam, with an average of €24.90. With regard to price differentiation, Keizer Karel Podia Nijmegen no longer implements price differentiation within the pricing systems, while Podium

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25 Note that the value of Rotterdamse Schouwburg is zero within this season. This is due to the fact that the theatre brochure of this particular season only included the information what the maximum ticket price is, making it impossible to establish the height of the second ticket price.

Twente has initiated price differentiation. Ticket prices at Zaantheater are still not influenced by price differentiations, making this the only theatre within the particular time period which hasn't implemented price differentiation in any season.

### *5.8.5. Overall price developments second rank*

| | 2007/08 | 2008/09 | 2009/10 | 2010/11 | 2011/12 |
|---|---|---|---|---|---|
| Stadsschouwburg Amsterdam | 0.99 | 1.18 | 1.00 | 0.89 | 1.20 |
| Schouwburg Almere | 0.00 | 0.00 | 0.00 | 1.03 | 0.99 |
| Chassé Theater Breda | 1.03 | 1.00 | 1.58 | 1.01 | 1.16 |
| Keizer Karel Podia | 1.00 | 1.00 | 1.00 | 1.10 | 0.00 |
| Musis Sacrum Schouwburg Arnhem | 1.00 | 1.01 | 1.13 | 1.14 | 1.29 |
| Stadsschouwburg Groningen/Oosterpoort | 1.07 | 0.98 | 1.05 | 1.03 | 1.08 |
| Parktheater Eindhoven | 0.97 | 1.15 | 1.05 | 1.12 | 1.21 |
| Rotterdamse Schouwburg | 1.15 | 1.00 | 0.00 | 0.00 | 1.39 |
| Theaters Tilburg | 0.00 | 0.00 | 0.00 | 0.82 | 1.14 |
| Podium Twente | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Stadsschouwburg Utrecht | 0.97 | 0.98 | 1.19 | 0.93 | 1.29 |
| Zaantheater | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Overall price developments | 1.02 | 1.04 | 1.15 | 1.01 | 1.18 |

**Table 5.8.5**. Average price development of second rank during period 2006-2012 within twelve selected theatres

Season 2007-'08

In comparison to previous season 2006-'07, ticket prices have increased with 2%, based on a range from a decrease of 3% at Parktheater Eindhoven as well as Stadsschouwburg Utrecht to an increase of 15% at Rotterdamse Schouwburg. Ticket prices at Chassé Theater Breda have increased with 3%, which is closest to the average.

Season 2008-'09

With an average increase of 4% per ticket, season 2008-'09 displays a range from a 2% ticket price decrease at both Stadsschouwburg Groningen/Oosterpoort as well as Stadsschouwburg Utrecht to an increase of 18% at Stadsschouwburg Amsterdam. Musis Sacrum Schouwburg Arnhem shows an increase of 1%, which is closest to the overall average.

Season 2009-'10

Within this season, a range of 0% at both Stadsschouwburg Amsterdam as well as Keizer Karel Podia Nijmegen, up to 58% at Chassé generate an overall average ticket price increase of 15%. This percentage is closest to Musis Sacrum Schouwburg Arnhem, which is displaying a ticket price increase of 13%.

Season 2010-'11

Comparing to previous season 2009-’10, ticket prices within season 2010-’11 have increased with 1% on the average, resulted from a range between a decrease of 18% at Theatres Tilburg up to an increase of 12% at Parktheater Eindhoven. Chassé Theater Breda shares the overall increase of 1%.

Season 2011-‘12

This season includes the largest increase in ticket prices compared to previous discussed seasons, namely 18%. This is constituted from a range between a decrease of 1% at Schouwburg Almere up to an increase of 39% at Rotterdamse Schouwburg. Ticket prices at both Stadsschouwburg Amsterdam, with an increase of 16%, as well as Chassé Theater Breda with an increase of 14% are positioned closest to the average.

### *5.8.6. Third rank*

The table below displays the ticket prices of the third rank. In alliance with the discussed table above, some theatres don’t implement price differentiation within pricing systems, which will be discussed as well.

| | 2006/07 | 2007/08 | 2008/09 | 2009/10 | 2010/11 | 2011/12 |
|---|---|---|---|---|---|---|
| Stadsschouwburg Amsterdam | 14.8 | 14.7 | 19.5 | 19.5 | 15.8 | 17.6 |
| Schouwburg Almere | 0.0 | 0.0 | 0.0 | 17.5 | 18.0 | 0.0 |
| Chassé Theater Breda | 0.0 | 0.0 | 0.0 | 22.1 | 22.7 | 26.0 |
| Keizer Karel Podia | 18.5 | 18.5 | 18.5 | 18,5 | 19.5 | 0.0 |
| Musis Sacrum Schouwburg Arnhem | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Stadsschouwburg Groningen/Oosterpoort | 10.8 | 11.4 | 11.4 | 14.2 | 14.6 | 15.8 |
| Parktheater Eindhoven | 15.5 | 14.4 | 17.0 | 17.5 | 20.5 | 23.6 |
| Rotterdamse Schouwburg | 12.4 | 14.3 | 14.3 | 0.0 | 20.0 | 28.4 |
| Theaters Tilburg | 0.0 | 0.0 | 0.0 | 12.3 | 12.4 | 12.9 |
| Podium Twente | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 18.6 |
| Stadsschouwburg Utrecht | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 14.0 |
| Zaantheater | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Overall average ticket price | 14.4 | 14.7 | 16.1 | 17.4 | 17.9 | 19.6 |

**Table 5.8.6**. Average ticket prices of third rank during period 2006-2012 within twelve selected theatres

Season 2006-‘07

The third rank within season 2006-’07 includes an average of €14.40 per ticket, ranging from €10.80 at Stadsschouwburg Groningen/Oosterpoort to €18.50 at Keizer Karel Podia. With an average ticket price of €14.80, ticket prices at Stadsschouwburg Amsterdam are closest to the average. With regard to price differentiation, it can be stated that only Stadsschouwburg Amsterdam, Keizer Karel Podia, Stadsschouwburg Groningen/Oosterpoort, Parktheater Eindhoven and Rotterdamse Schouwburg integrate price differentiation within the pricing system.

Season 2007-‘08

A range from €11.40 to €18.50 per ticket generates an overall average ticket price of €14.70 within this season, with Stadsschouwburg Amsterdam having the same ticket price as the overall average. Based on the table, it can be noted that there aren't any changes with regard to the quantity of theatres that integrate price differentiation in pricing systems.

Season 2008-'09

The overall average ticket price lies at €16.10, which is created by a range from €11.40 per ticket at Stadsschouwburg Groningen/Oosterpoort up to €19.50 per ticket at Stadsschouwburg Amsterdam. Closest to the overall average is the average ticket price of €17.00 at Parktheater Eindhoven. Price differentiation is still included in the same theatres as the two previously discussed seasons.

Season 2009-'10

The third rank within this season has generated an overall average ticket price of €17.40, which is the result from a range from €12.30 per ticket at Theaters Tilburg up to €22.10 per ticket at Chassé Theater Breda. With an average ticket price of €17.50, ticket prices at both Schouwburg Almere as well as Parktheater Eindhoven are situated closest to the average.

Is can be noted that Schouwburg Almere, Chassé Theater Breda and Theaters Tilburg all commenced third rank price differentiation from this season on, which results in the fact that now the majority of the theatres has implemented a third rank in the pricing systems.[26]

Season 2010-'11

An overall average ticket price of €17.90 is the result of a range from €12.40 at Theatres Tilburg to €22.70 at Chassé Theater Breda. Schouwburg Almere and its' average ticket price of €18.00 is situated nearest the overall average. With regard to price differentiation, it is noticeable that the majority of the theatres still integrate price differentiation with a third rank in the pricing systems, with the exception of Musis Sacrum Schouwburg Arnhem, Podium Twente, Stadsschouwburg and Zaantheater.

Season 2011-'12

The average ticket price of €19.60 makes the ticket in this season the most expensive tickets. The average ticket price is the result of a ticket price range of €12.90 at Theaters Tilburg to €28.40 at Rotterdamse Schouwburg. With regard to price differentiation, it can be noticed that both Podium Twente as well as Stadsschouwburg Utrecht initiated to use a third rank in the price differentiation. Also note that Schouwburg Almere has stopped implementing a third rank in the pricing system.

26 Note that Rotterdamse Schouwburg most likely does include third rank in the price differentiation, due to the fact that price differentiation takes place in every other season. However, the fact that there isn't a value present in the table is due to the fact that the brochure of Rotterdamse Schouwburg didn't elaborate on price differentiation, but rather give only an indication of maximum ticket prices. Therefore, the theatre is excluded from calculating the overall average ticket price.

### *5.8.7. Overall price developments third rank*

| | 2007/08 | 2008/09 | 2009/10 | 2010/11 | 2011/12 |
|---|---|---|---|---|---|
| Stadsschouwburg Amsterdam | 0.99 | 1.33 | 1.00 | 0.81 | 1.11 |
| Schouwburg Almere | 0.00 | 0.00 | 0.00 | 1.03 | 0.00 |
| Chassé Theater Breda | 0.00 | 0.00 | 0.00 | 1.03 | 1.15 |
| Keizer Karel Podia | 1.00 | 1.00 | 1.00 | 1.05 | 0.00 |
| Musis Sacrum Schouwburg Arnhem | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Stadsschouwburg Groningen/Oosterpoort | 1.06 | 1.00 | 1.25 | 1.03 | 1.08 |
| Parktheater Eindhoven | 0.93 | 1.18 | 1.03 | 1.17 | 1.15 |
| Rotterdamse Schouwburg | 1.15 | 1.00 | 0.00 | 0.00 | 1.42 |
| Theaters Tilburg | 0.00 | 0.00 | 0.00 | 1.00 | 1.04 |
| Podium Twente | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Stadsschouwburg Utrecht | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zaantheater | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Overall price developments | 1.02 | 1.10 | 1.08 | 1.03 | 1.09 |

**Table 5.8.7**. Average price development of third rank during period 2006-2012 within twelve selected theatres

Season 2007-‘08

As becomes clear from the table above, the price increase constitutes of 2% in comparison to season 2006-’07. A decrease of 7% can be noted for Parktheater Eindhoven, while Rotterdamse Schouwburg increased prices with 15%. Ticket prices at Keizer Karel Podia Nijmegen remained equal, making their price development closest to overall average.

Season 2008-‘09

The average ticket price increase constitutes of 10% in comparison to previous season, which is due to price increase of 33% at Stadsschouwburg Amsterdam and 18% at Parktheater Eindhoven. Ticket prices at Keizer Karel Podia Nijmegen, Stadsschouwburg Groningen/Oosterpoort and Rotterdamse Schouwburg remained equal to previous season, which prices are also closest to the overall price developments.

Season 2009-‘10

This season includes a smaller growth in comparison to previous season, namely an average of 8%, which is due to a range of an equal price at both Stadsschouwburg Amsterdam as well as Keizer Karel Podia Nijmegen and a ticket price increase of 25% at Stadsschouwburg Groningen/Oosterpoort. With an increase of 3%, ticket prices at Parktheater Eindhoven have increased closest to overall average.

Season 2010-‘11

The overall average ticket price increase is 3% within this season. This is due to a range from a decrease of 19% at Stadsschouwburg Amsterdam up to an increase of 17% at Parktheater Eindhoven.

Schouwburg Almere, Chassé Theater Breda and Stadsschouwburg Groningen/Oosterpoort all share the average ticket price increase of 3%.

Season 2011-'12

A wide range from a 4% increase at Theaters Tilburg to a 42% increase at Rotterdamse Schouwburg generates an overall average ticket price increase of 9%. With an average price increase of 8%, Stadsschouwburg Groningen/Oosterpoort comes closest to the average.

# 6. CONCLUSIONS OF THIS RESEARCH AND SUGGESTIONS FOR FURTHER RESEARCH

## 6.1. Introduction

The emergence of the global financial crisis in the year 2007 has initiated great global financial instability up until now, which is noticeable for the majority of society as has been discussed previously in the second chapter of this research. The focus within this research lays with the effects of the financial crisis on the art and culture sector, with in particular the performing arts sector in the Netherlands. The effects of the financial crisis have been discussed in the third chapter of this thesis. To summarize, the Dutch government has felt forced to cut back spending within the arts sector in the Netherlands, and especially in the performing arts sector, in which the budgetary cuts increasingly take place since 2007. These budgetary cuts have been the starting point of the research; to conduct research on the evolution of the performing arts sector in the Netherlands and to explore whether the performing arts sector has experienced consequences from the financial changes in society. As discussed in chapter four, the basis of the research has been generated by the data obtained from six theatrical seasons of twelve selected theatres in the Netherlands. The analysis of the data has led to the opportunity to draw several conclusions, based on the research questions, which will be discussed in the next paragraph.

## 6.2. Concluding the research

Research question 1: *Regarding the selected period of 2006-2012, are there fluctuations to be distinguished within the total absolute quantities of performances per season in the selected Dutch theatres?*

Based on the data retrieved from the twelve selected Dutch theatres, it can be stated that the total absolute numbers of performances has shown an increase from 4,286 performances in season 2006-'07 up to 4,678 performances in season 2009-'10, but is revealing a decrease in last included season 2011-'12, with a total of 4,431 performances. This decrease after four years is somewhat unexpected, due to the fact that this decrease breaks the subsidy period of four years in which the height of subsidies does not alter. This could indicate other factors of influence of this decrease, in this case the credit crunch. Overall, it can be stated that influence of the global financial instability has reached the performing arts sector in the Netherlands with a delay of four years, namely in season 2011-2012.

Research question 2: *Are certain genres, such as cabaret and/or musical, programmed increasingly during the selected time period of 2006-2012, with a possible result of flattening within the programming of the selected theatres?*

As a result of the credit crunch, cultural institutions are increasingly expected by the Dutch government to take in an entrepreneurial standpoint, as discussed in paragraphs 1.1.2. and 3.6. In addition, it is often stated that theatres tend to program increasingly homogenously, with a focus on cabaret and musical performances. However, my research has shown that this in fact not the applicable for the performances in the selected twelve Dutch theatres. To answer this particular research question, the results have been generated in paragraph 5.5. In this paragraph, it becomes clear that, although the absolute numbers of performances has in fact diminished in season 2011-'12 to 4431 performances, the composition of the performances with regard to certain genre divisions hasn't altered substantially during the period of 2006-2012 within the twelve selected theatres in the Netherlands. On the contrary, figure 5.5 is clearly showing a certain trend that remains more or less equal seasonally without any clear outliners. The only minor exception in this case is represented by the genre of musical/show/entertainment in season 2010-'11. In this particular season, the genre has experienced the highest number of performances. Overall it can be stated that flattening does not occur in the selected twelve theatres in the Netherlands.

Research question 3: *How is the ratio of the genre theatre altering during the period 2006-2012 in the selected Dutch theatres in comparison to the overall total quantity of performances per season within the selected theatres?*

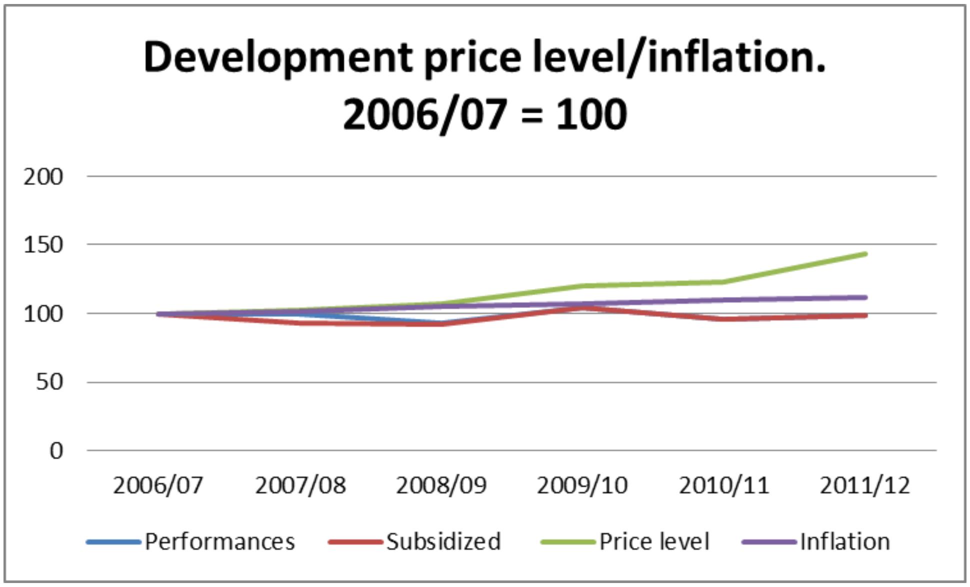
The information provided from the data leads to the conclusion that the ratio theatre performances in comparison to overall total performances fluctuates between 23% and 27%, establishing an overall average of 25% of theatre performances. Hence, no major fluctuations are noticeable within this particular time span of 2006-2012. The final included season 2011-'12 included a share of theatre performances of 26% on the total, 1% above overall average. Therefore, it would appear that the credit crunch has little possible effects on the share of theatre performances in comparison to the total number of performances.

Research question 4: *Which variation can be distinguished in the selected Dutch theatres when observing the segment of subsidized theatre performances per season, as part of the total number of performances within the genre theatre?*

In order to be able to answer this particular research question, the ratio of subsidized theatre performances versus non-subsidized theatre performances has been researched more closely. The outcome of the observation of these ratios resulted in the statement that the majority of the theatre performances are financed by at least one form of subsidies, derived from either the State, Fund for Performing Arts, provinces and/or cities. The share of subsidized theatre performances within the twelve selected theatres range from 61% in season 2007-'08 up to 66% in both season 2010-'11 as well as 2011-'12. Therefore, it can be concluded that the variation in between seasons does not fluctuate substantially. Instead, it differs only by a few percentages.

Research question 5*: Is there a relationship between price development and number of performances supplied by the selected theatres?*

The following graph shows number of theatre performances and the number of subsidized theatre performances. Moreover, the ticket price development of first rank tickets as well as general inflation in the Netherlands during the period 2006-2012 is presented in the graph.




**Graph 6.2** Development of price level in comparison to inflation[27], number of theatre performances and subsidized theatre performances. Season 2006-'07 represents index=100.

With regard to the number of theatre performances, it can be concluded that the total number has remained approximately steady. In addition, the subsidized theatre performances show a steady pattern as well, with a minor exception in season 2009-'10. The general inflation in the Netherlands shows a steady increase during this period, an average annual increase of 2%. In comparison, the price level of the ticket price for theatre performances displays a seasonal increase of 7% although governmental subsidies have remained at the same level during this period. The largest price increase is shown in season 2011-'12, with 20.5%. Based on these results, it can be stated that the supply of theatre performances is inelastic, due to the fact supply remains the same, while price increases occurred during the same period. However, note that this conclusion is not drawn based on elasticity of demand, but supply driven. With regard to the demand elasticity, visitor numbers generate extending results with regard to this particular subject, which could be an interesting point of view to initiate a following research.

27 Source inflation numbers: http://www.cbs.nl/nl-NL/menu/themas/prijzen/nieuws/default.htm

Main research question: *What are the effects of the global credit crunch and the related budget cuts of the Dutch government on the content of programming in the selected theatres in the Netherlands during the period 2006-2012?*

Overall, based on the collected data, it can be stated that the mind-set within the performing arts sector in the Netherlands has altered somewhat during the period 2006-2012. This is the result of different influential factors, such as changing Dutch cultural policy. The absolute number of total performances has decreased in season 2011-'12, after a period of seasonal increases, which could indicate an effect of the credit crunch on the performing arts sector . However, this decrease in total performances has little effect on the segmentation of the genres per season, as well as the share of theatre performances in comparison to the overall total performances. The composition of the genres fluctuates little when comparing the content of the programming per season. Finally, the ticket prices have increased more than general inflation in the Netherlands, which implies a relative price increase of the ticket prices.

### 6.3. Suggestions for further research

With regard to suggestions for further research, there are several options in order to expand and build on this research. As stated in paragraph 4.6, certain topics have been excluded from this particular research, but which could certainly provide us with interesting information. Firstly, regarding pricing in the performing arts, it has been decided to focus on the ticket prices for visitors. In order to expand knowledge, it could be interesting to examine the costs theatres make in order to generate performances. When this is researched as well, both supply as well as demand prices can be compared to one another. Secondly, in this research, the decision has been made to conduct research on the period 2006-2012. This has led to the result that the final included season 2011-2012 has displayed a decrease of total amount of performances, while showing the largest price increase as well, like has been discussed in answering the fifth research question. What could generate interesting result is to examine whether this is only a short term reaction of the credit crunch and related governmental policy and budget costs, or the start of other developments. Thirdly, this research hasn't taken the visiting numbers of the selected performances into account, from which could become clear whether the visitor numbers per season could have an impact on subsequent season.

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Parktheater (Eindhoven);
Podium Twente/Muziekkwartier (Enschede);
Rotterdamse Schouwburg (Rotterdam);
Schouwburg Almere (Almere);
Stadsschouwburg Amsterdam (Amsterdam);
Stadsschouwburg Utrecht (Utrecht);
Theaters Tilburg (Tilburg);
and Zaantheater (Zaanstad)