

WORLD AND TRAD DATA: SIMPLE FILL IN SET

Summary

In comparison to the latest collected data (2014) on world/tradmusic in the Netherlands we have found the following tendencies:

- - 20% of single concerts presented in the Large Venues (> 600)
- - 25% of single concerts presented in Club/Pop Venues
- -40% of single concerts presented in Open Air Venues
- a stabilization of single concerts presented in small/medium Venues
- a significant increase of concerts presented at festivals
- a stabilization of audience reach of 2 million
- an increase of world/trad music presented at Jazz and Popfestivals
- a serious shift to the presentation of Cross-over Music and consequently a
- further decrease on the presentation of traditional and Arts Music

Conclusion:

Based upon the figures of 2014 we wrote that 'Although the economical crisis has caused a relatively great decline of world/tradmusic public performances we are overall not pessimistic'. The present figures (2016) however show a different pattern causing us to alter our point of view.

Main cause of pain being the fact that most Dutch venues are financially dependant upon municipal support. Subsequent to budget cuts by the Dutch Government on municipalities these lesser funds were subdivided and charged to local institutions, venues being one of the victims. This fact caused venues to cut their proper costs , among others by presenting a more mainstream programme and as such cutting out the 'riskier' genres as world/tradmusic, contemporary classical music and contemporary jazz. Other venues were forced to cut back finances drastically, halving the programme, as was the case with Rasa Utrecht.

The budget cuts also reflected upon the volume of staff: many were dismissed and in some cases replaced by volunteers causing a drain of knowledge and professional workforce.

Collateral damage appeared through side effects such as lesser booking agencies, lesser jobs, lesser fees for bands and lesser international bands touring the Netherlands.

Despite all this the audience is still there and so is the music, and very vivid indeed. Many Artists have sought their way out by focussing on performances abroad and as such advocating the high quality of Dutch world/trad music.

The overall turnover has been specified in regard to the outcome of the 2014 report and we can conclude that, although not complete, the turnover has marginally declined due to an increase on ticketing as well as an increase of new festivals (Morgenland Amsterdam, DiverCity The Hague etc.) or festivals prolonging their duration.

The Netherlands is gifted with a large number of venues, concert halls, clubs, open air stages, festivals (indoor as well as outdoor), community facilities and music bars dispersed throughout the country. Most of these depend heavily on subsidies allocated by diverse layers of governmental institutions; be it national, provincial or municipal or a mix of these. Some festivals and music bars are run privately on a strictly commercial basis.

All of these venues run world/trad music concerts.

However, due to severe budget cuts on the Arts and Culture by the governmental institutions we observe a decrease of world- and trad music of about 50% compared to our last data as published in the report ‘ a World of Sounds and Opportunities’ , based upon data gathered in 2011.

Some important venues for hosting world- and trad music were forced to shut down (Tropentheater, Amsterdam) or forced to impose drastic budget cuts (RASA, Utrecht; de Doelen, Rotterdam; de Regentes, The Hague amongst others). Other venues were forced to cut their budgets which consequently led to more mainstream programmes; world- and trad music as well as contemporary classic music being the main victims of this policy.

1. Festivals for World and Trad 2016

	Number of festivals	Turnover best guess	Turnover minimal	Turnover maximum	Audience best guess	Audience minimum	Audience maximum
Festivals							
Predominantly world	55					1.375.000	
World/trad features	135					2.500.000	

The Netherlands is going through a period of ‘festivalization’. This is also shown in the figures on world/trad music: more festivals, existing festivals expanding with a day as opposed to less single concerts in the venues. We also notice an increase of world music on the stages of multidisciplinary festivals as Lowlands, Zwarte Cross and the larger Jazz festivals. The increase however can be attributed solely to crossover bands and Artists. Art music and traditional music do not play an important role in the increase. These forms of music can only be found at thematic Festivals as Sacred Music or Along the Silk Road.

Most of the predominantly World music Festivals are free festivals and funded by governmental institutions and private funds. A turnover estimate is hard to tell but figures show that the audience spent an average of € 12,- on consumptions. This would mean a turnover of € 16.500.000,- gross, roughly € 8.250.000,- net. This net sum forms generally 1/3rd of the budget meaning that the overall turnover is somewhere near € 24.750.000,-

A great deal of the larger festivals is run on a commercial basis with hardly any financial support from governmental institutions. It is for this reason that hardly any public figures are available as to give an estimate on the turnover.

2. Venues for World and Trad 2014

	Number of venues	Turnover best guess	Turnover minimal	Turnover maximum	Audience best guess	Audience minimum	Audience maximum
Venues			Ticketing:				
1. large 700>	145		€ 11.207.268,-			518.375	
2. club	53		€ 972.287,-			70.315	
3. open air	40		€ 79.734,-			3.688	
4. small <150	180		€ 687.690,-			48.600	
5. community	300		€ 1.273.050,-			135.000	

Almost all of the venues – but the Musicbars – are partly funded by governmental institutions on all levels. However, the amount of support differs from venue to venue mostly depending upon their task and or role in the national or local Cultural field. A great deal of the venues are active in the densely populated area formed by the cities of Amsterdam – Rotterdam – Utrecht – The Hague, called ‘Randstad’ (or rim-city). This megalopolis is located in the western-central region of the Netherlands and although only taking 20% of it’s territory it inhabits and employs half of the Dutch population. It is also one of the most cultural diverse areas in the World with over 185 nationalities living in the Randstad. Hence it is no surprise that most venues can be found here although all of the 390 municipalities in the Netherlands have their own cultural facilities. As stated in the introduction we have seen a decline of 50% of single world/tradmusic concerts between 2011 and 2016. The overall volume of concerts is partly compensated by the festivalization of the cultural landscape. (see above)

3. Professionals involved in World and Trad, 2014

	Best guess	Minimum	Maximum	Comments
Musicians		10.600		
Composers		1.500		
Venue and event staff				
Bookers and Agents		65		
Other (please specify): Audio.video/download	€ 17.000.000			
Total				

In order to give a proper estimate we have counted only (semi) professional musicians who spend at least 20 hours per week on their craftsmanship and earn money by performing. There are 1.500 bands operating in the field of worldmusic and 400 in traditional music. The average worldmusic band consists of 6 members; the average traditional band of 4 members leading to 10.600 active musician.

Buma is the author rights organization in the Netherlands and has 25.000 members; an estimated 6% is registered as world/trad composer, equalling 1500 active composers. During this survey we have noticed that some composers active in the Netherlands are not a member of Buma but of associated companies as Sacem (France) or Sabam (Belgium). This is mainly because their Publishing Company or Record Company is located in these countries.

With the decline of concerts some booking agencies and agents didn't make it through the economical crisis. In 2014 some 65 bookers, agents and managers were active in world/tradmusic. Most of these professionals working as an independent with no employees and a modest artist roster. However, a great deal of the market is in the hands of some 12 larger companies.

Most of the smaller booking agencies and agents active cannot live properly of their revenues and almost all have a second job in order to survive.

As the world/tradmusic is still considered a niche market we estimated the worth of cd/dvd and download sales in 2011 at between € 14.000.000,- and € 21.000.000., We have found no indications that this figure has altered much. Therefore € 17.000.000,- is estimated.

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Main cause of pain being the fact that most Dutch venues are financially dependant upon municipal support. Subsequent to budget cuts by the Dutch Government on municipalities these lesser funds were subdivided and charged to local institutions, venues being one of the victims. This fact caused venues to cut their proper costs , among others by presenting a more mainstream programme and as such cutting out the 'riskier' genres as world/tradmusic, contemporary classical music and contemporary jazz. Other venues were forced to cut back finances drastically, halving the programme, as was the case with Rasa Utrecht.

The budget cuts also reflected upon the volume of staff: many were dismissed and in some cases replaced by volunteers causing a drain of knowledge and professional workforce. Collateral damage appeared through side effects such as lesser booking agencies, lesser jobs, lesser fees for bands and lesser international bands touring the Netherlands.

The audience is there and so is the music, and very vivid indeed. Many Artists have sought their way out by focussing on performances abroad and as such advocating the high quality of Dutch world/trad music.

The overall turnover has been specified in regard to the outcome of the 2016 (2014 figures) report and we can conclude that, although not complete, the turnover has declined primarily amongst the larger venue circuit as well as the open air circuit where World/Tradmusic became almost non-existent.

Legend:

- **Best guess:** use the answer that you as a correspondent have most faith in.
- **Minimum and Maximum:** the upper and lower value found. If you have just one informant: usually he or she will come up with a range (no less than ...no more than ...). Use that range. If you have more than one informant: use the lowest and the highest estimate in the answers you get.
- **Other (please specify):** use this to designate activities not covered by suggested items. Add as many as you want! Just use the format supplied and add more lines.
- **If you draw blanks:** do not bother. Just leave out the answers for those items. Remember: in the end, the values for **Total** are the most important part.