Kulturaren Euskal Behatokiaren Estatistika eta Azterketa Bilduma
Colección de Estadística y Estudios del Observatorio Vasco de la Cultura

63

GAZES

An analytical reading of the data of the Statistics for Arts and Cultural Industries

2019

EUSKO JAURLARITZA
GOBIERNO VASCO

KULTURA ETA HIZKUNTZA POLITIKA SAILA

DEPARTAMENTO DE CULTURA Y POLÍTICA LINGÜÍSTICA

Kulturaren Euskal Behatokiaren Estatistika eta Azterketa Bilduma
Colección de Estadística y Estudios del Observatorio Vasco de la Cultura

63

GAZES

An analytical reading of the data of the Statistics for Arts and Cultural Industries

2019

EUSKO JAURLARITZA
GOBIERNO VASCO

KULTURA ETA HIZKUNTZA POLITIKA SAILA

DEPARTAMENTO DE CULTURA Y POLÍTICA LINGÜÍSTICA

Eusko Jaurlaritzaren Argitalpen Zerbitzu Nagusia
Servicio Central de Publicaciones del Gobierno Vasco

Vitoria-Gasteiz, 2022

A catalogue record of this book is available in the catalogue of the General Library of the Basque Government:
https://www.katalogoak.euskadi.eus/cgi- bin_q81a/abnetclop?SUBC=VEJ/J0001

Edition: 1st, february 2022

Internet: www.euskadi.eus

Publisher:
Eusko Jaurlaritzaren Argitalpen Zerbitzu Nagusia
Servicio Central de Publicaciones del Gobierno Vasco C/ Donostia-San Sebastián, 1 01010 Vitoria-Gasteiz

Technical coordination: ICC-CONSULTORS CULTURALS, SL

Fielwork: SIADECO, S.COOP

Design and Layout: Miren Unzurrunzaga Schmitz

Traduction: LETE Itzulpenak-traducciones, SL

ISBN: 978-84-457-3623-4

Contents

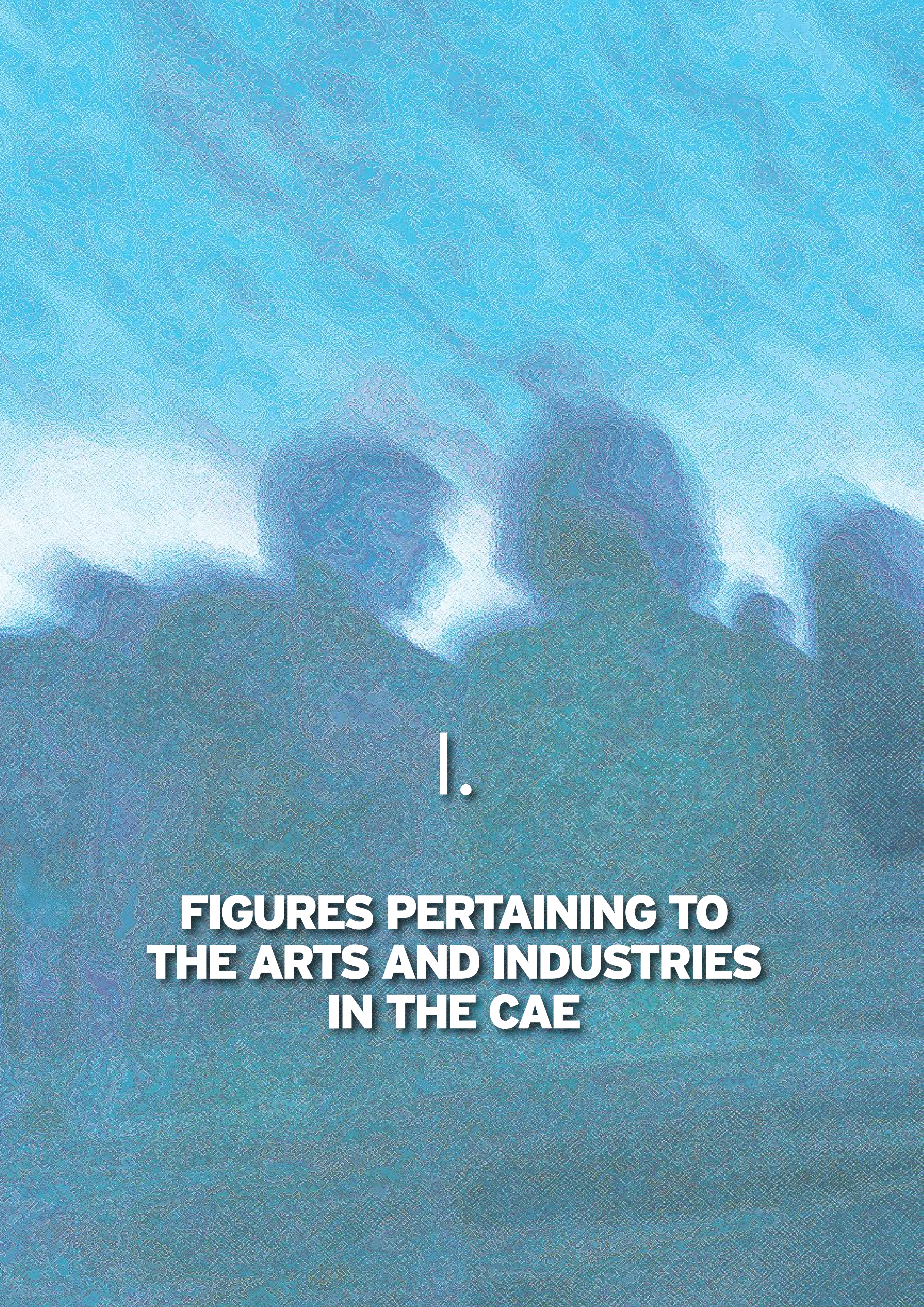
Introduction

The Gazes 2019 report presents data extracted from the seventh edition of the ***Statistics for Arts and Cultural Industries***. The statistics were started in 2007 and in 2009, record and bookshop businesses and publishers were incorporated; in 2017, cinemas were incorporated.

The intention of the report is to offer a complementary reading to the sectoral data with an interpretive vocation. It contributes two elements of special interest: the vision of the cultural sector as a whole and interdisciplinary readings. The analysis is structured in two large sections:

Firstly, general indicators of the arts and cultural industries are presented by means of the main figures referring to their sectoral dimension, the ownership of the agents who have participated and their territorial distribution.

Secondly, cross-sectional views of the data are provided: asymmetries within sectors, the distinction between reproducible culture and live culture, the evolution of the economic activity of agents, the weight of the Basque language in cultural activity, the degree of public dependence among private agents, the level of renewal and internationalisation and the presence of women in employment.



I.

FIGURES PERTAINING TO THE ARTS AND INDUSTRIES IN THE CAE

1. Sectoral dimension

The seventh edition of the *Statistics for Arts and Cultural Industries,* whose reference year is 2019, contains data from 701 agents of the Autonomous Community of the Basque Country (CAE) which comply with the **requirements** to be part of the census. They are agents who carry out their activity in the field of production, exhibition and commerce in the following sectors:

- The **performing arts** sector comprises 140 programming agents and 99 producers. Halls (96) and festivals (44) are considered among the programmers. Production is led by professional theatre (83) and dance (16) companies.

- The **book** sector gathers 119 agents, of which 82 are bookshops and 37 publishers.

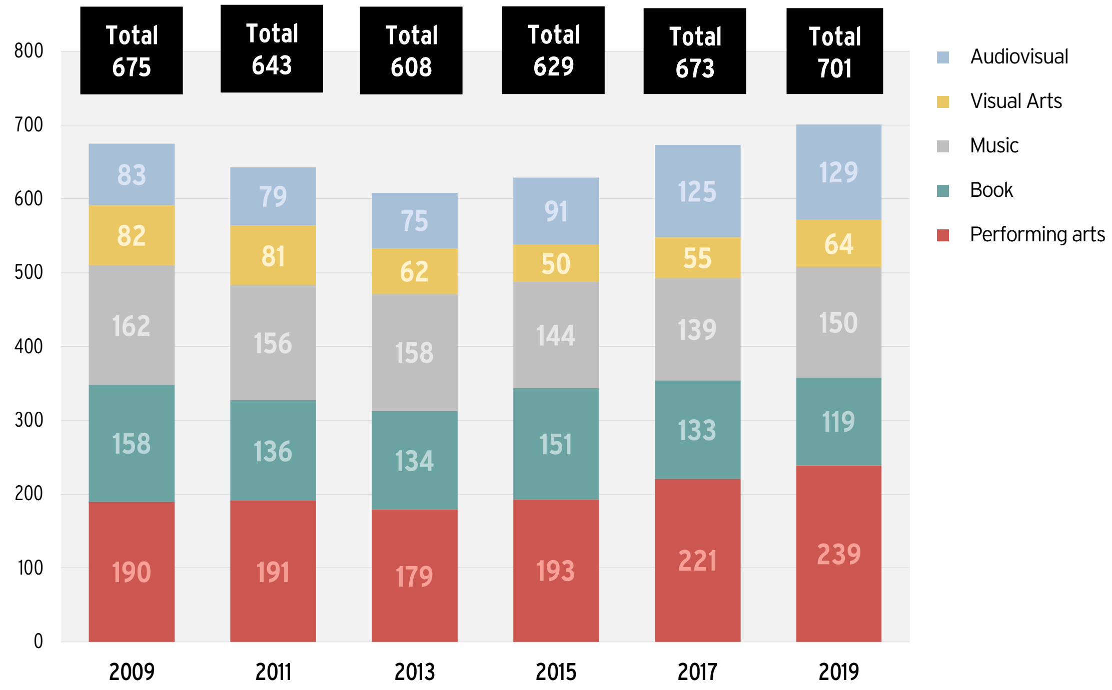
- The **music** sector, with 150 agents, comprises 129 entities devoted to programming live music and 21 entities who form part of the record industry. Among the music programmers, there are 85 public agents (also including orchestras), 9 music bands, 19 private promoters and 16 concert halls. The record industry is represented by 5 record labels and 16 record shops.

- The **visual arts** account for a total of 64 agents, shared between exhibition halls (43), which also include visual arts producers, and art galleries (21).

- The **audiovisual sector** is formed by 129 agents: 75 producer agents and 54 cinemas.

Figure 1.

Agents by sector. Absolutes. 2009-2019



In this 2019 edition there is nothing new regarding the type of agents. The only thing that must be taken into account is that music and *txistulari* bands are again incorporated, a profile that was not included in 2017.

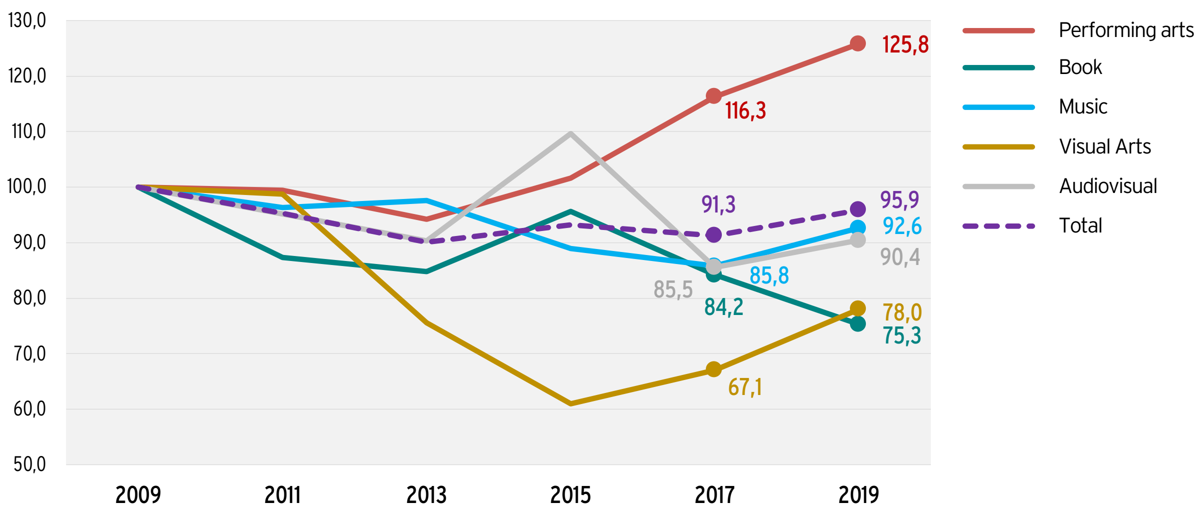
The performing arts are the sector that has presented the most positive evolution since 2009, taking into account that there have been no methodological changes that affect this sector. Since 2009, the sector has increased by 25.8%.

The visual arts sector, having been the most seriously affected sector in the last few years, presents a clear recovery with regard to 2015.

In the case of books, editorial production remains steady, but the decline in bookstores is accentuated. The music sector experiences two opposing dynamics: live music rebounds in its public aspect and remains the same in terms of private promoters. The situation in concert halls is more delicate, with a decrease in the number of agents, as is the case with record industry, whose trend shows a slight decline edition after edition. It must be clarified that in this edition music and *txistulari* bands are incorporated again (9 agents).

Figure 2.

Evolution of the agent network by sector. 2009-2019. Base index 100=2009



Note: cinema data are not included.

In relation to 2017, the fabric increased in most sectors, standing out in this order the exhibitors and producers of visual arts (19.4%), public music programmers (10.4%), art galleries (10,5%), performing arts programmers (8.5%), performing arts companies (7.6%) and audiovisual production companies (5.6%).

The sectors that lose density are concert halls (20%), record companies (16.7%), record stores (5.9%) and bookstores (15.5%).

Figure 3.

Agents by sector and agent typology. Absolutes and percentage. 2017-2019

Sector	Agent typology	2017		2019		Variation 2017-2019
		Frec.	%	Frec.	%	%
Performing arts	Producer	92	13,7	99	14,1	▲7,6
	Programmer	129	18,8	140	20,0	▲8,5
Book	Publisher	36	5,4	37	5,3	▲2,8
	Bookshop	97	14,5	82	11,7	▼15,5
Music	Public programmer	77	11,5	85	12,1	▲10,4
	Private promoter	19	2,8	19	2,7	-
	Concert hall	20	3,0	16	2,3	▼20
	Music bands	-	-	9	1,3	
	Record company	6	0,9	5	0,7	▼16,7
	Record shops	17	2,5	16	2,3	▼5,9
Visual Arts	Exhibitor	36	5,4	43	6,1	▲19,4
	Art gallery	19	2,8	21	3,0	▲10,5
Audiovisual	Producer	71	10,6	75	10,7	▲5,6
	Cinemas	54	8,1	54	7,7	-
Total		673	100,0	701	100,0	▲4,2

Note: Orchestras were included in the data of public music programmers and visual arts producers in the data for exhibitors of visual arts for reasons of data confidentiality.

The balance of expenditure and revenue in 2019 is positive, with a tendency to balance, with a result of 4.3 million euros, representing 1% of the total revenue.

In relation to 2017, in practically all sectors, revenues show a positive trend, and those whose balance is negative do not register significant drops (not exceeding 1.6%).

Figure 4.

Revenue, expenditure and balance by sector and agent typology.

Thousands of euros and percentage. 2019

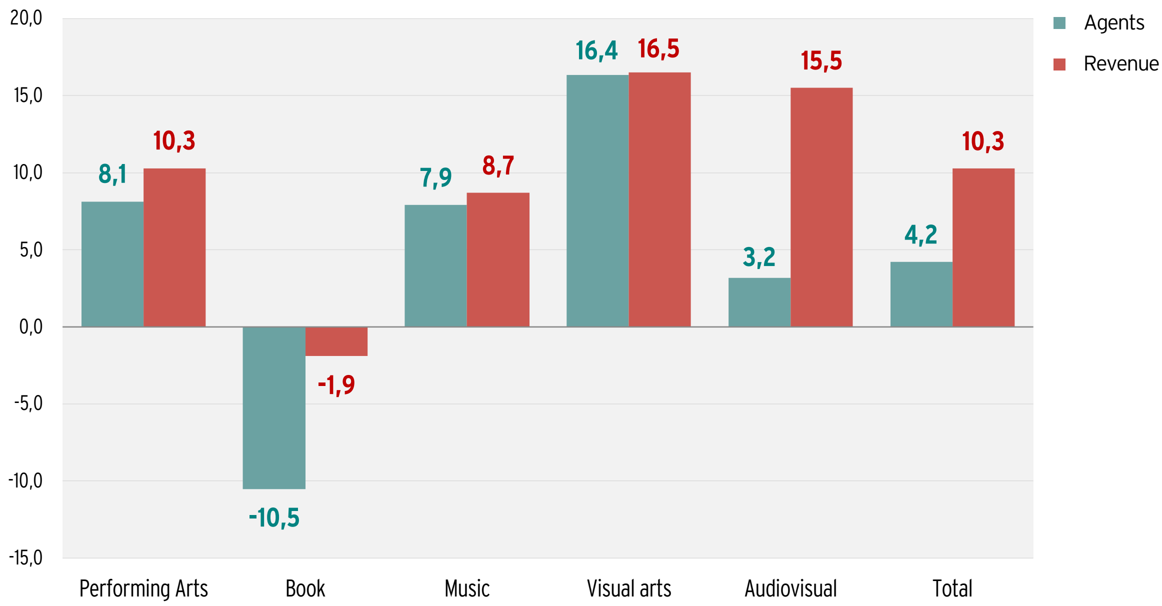
Sector	Agent typology	Revenue	Expenditure	Balance	Percentage of the total revenue
		Thousand euro	Thousand euro	Thousand euro	%
Performing arts	Producer	20.545,4	19.528,6	1.016,8	4,9
	Programmer	41.149,8	41.809,4	-659,5	-1,6
Book	Publisher	28.080,5	28.524,9	-444,4	-1,6
	Bookshop	41.465,9	40.165,6	1.300,3	3,1
Music	Public programmer	36.991,4	37.049,2	-57,8	-0,2
	Private promoter	43.453,4	43.087,0	366,4	0,8
	Concert hall	4.917,2	4.745,5	171,7	3,5
	Music bands	9.967,7	9.970,6	-2,9	0,0
	Record company	437,2	427,5	9,7	2,2
	Record shops	2.390,1	2.316,2	73,9	3,1
Visual Arts	Exhibitor	10.790,2	10.243,6	546,5	5,1
	Art gallery	3.454,0	1.805,8	1.648,2	47,7
Audiovisual	Producer	177.668,3	178.896,4	-1.228,1	-0,7
	Cinemas	28.041,7	26.385,2	1.656,5	5,9
Total		449.352,7	444.955,6	4.397,1	1,0

Note: Orchestras were included in the data of public music programmers and visual arts producers in the data for exhibitors of visual arts for reasons of data confidentiality.

As can be seen in figure 5, both agents and revenues increase in all sectors, with the exception of the book sector. In music and the performing arts, the increase in income is slightly higher than the increase in the number of agents; in the visual arts, the proportion of the increase is similar in agents and income. The behaviour of income in the audiovisual sector stands out, a sector which accumulates 4 out of every ten euros of the total income of the Arts and Cultural Industries and which, moreover, registers an increase of 15.5%. In the negative direction is the book sector, although the decrease in the fabric is not reflected in a similar proportion in the sector's income.

Figure 5.

Variation in the number of agents and revenue by sector. Percentages. 2017-2019



Regarding employment, the total number of workers in 2019 is 3,338.6 with an increase of 13.7% compared to 2017 (402 annualized jobs). Audiovisual production stands out, accounting for 38.7% of the total. All sectors register positive behaviour in terms of job creation, except for bookstores, where around 20 jobs are lost, and art galleries, although it must be taken into account that, given their size, in absolute terms we are speaking about two fewer jobs.

Figure 6.

People employed (equivalent to full-time annualised) of agents by sector and agent typology. Absolutes and percentages. 2017-2019

Sector	Agent typology	2017		2019		Variation 2017-2019
		Freq.	%	Freq.	%	%
Performing arts	Prod.	287,1	9,8	323,4	9,7	▲ 12,6
	Prog.	277,5	9,4	328,7	9,8	▲ 18,4
Book	Publisher	173,3	5,9	178,7	5,4	▲ 3,1
	Bookshop	250,8	8,5	231,3	6,9	▼ 7,8
Music	Public programmers	281,6	9,6	289,9	8,7	▲ 3,0
	Private promoters	92,6	3,2	113,2	3,4	▲ 22,2
	Concert hall	42,9	1,5	52,3	1,6	▲ 21,9
	Music bands	-	-	191,4	5,7	
	Record company	3,5	0,1	4,7	0,1	▲ 33,3
	Record shops	16,1	0,5	16,9	0,5	▲ 4,8
Visual Arts	Exhibitor	61	2,1	67	2	▲ 9,8
	Art gallery	34,3	1,2	32,4	1	▼ 5,4
Audiovisual	Prod.	1.218,20	41,5	1.290,80	38,7	▲ 6,0
	Cinemas	197,3	6,7	218,1	6,5	▲ 10,5
Total		2.936,20	100	3.338,60	100	▲ 13,7

Note: Orchestras were included in the data of public music programmers and visual arts producers in the data for exhibitors of visual arts for reasons of data confidentiality.

Distribution by professional functions shows that its structure remains very similar edition after edition, highlighting the jobs linked to technical functions (53.4%). Management positions represent 13.6% of the total, those related to management and administration 14.1%, and those dedicated to maintenance, cleaning and security 18.9%.

Figure 7.

People employed (equivalent to full-time annualised) of agents by sector, agent typology and professional categories.

Absolutes and percentages. 2019

Sector	Agent typology	Directorship		Technique		Management/ Administration		Others		Total	
		Frec	%	Frec	%	Frec	%	Frec	%	Frec	%
Performing arts	Producers	100,1	30,9	66,6	20,6	63,6	19,7	93,1	28,8	**323,4**	**100,0**
	Programmers	42,6	13,0	125,4	38,1	94,0	28,6	66,7	20,3	**328,7**	**100,0**
Book	Publisher	36,1	20,2	76,9	43,0	58,3	32,6	7,4	4,1	**178,7**	**100,0**
	Bookshop	34,5	14,9	88,9	38,4	59,4	25,7	48,5	21,0	**231,3**	**100,0**
Music	Public programmers	16,0	5,5	122,1	42,1	38,6	13,3	113,3	39,1	**289,9**	**100,0**
	Private promoters	29,8	26,3	33,9	30,0	33,9	30,0	15,5	13,7	**113,2**	**100,0**
	Concert hall	9,3	17,8	4,0	7,7	7,1	13,5	31,9	61,0	**52,3**	**100,0**
	Music bands	9,6	5,0	179,8	93,9	2,0	1,0	0,0	0,0	**191,4**	**100,0**
	Record company	1,4	30,2	2,4	51,0	0,7	15,4	0,2	3,3	**4,7**	**100,0**
	Record shops	4,5	26,6	6,7	39,6	2,0	11,9	3,7	22,0	**16,9**	**100,0**
Visual Arts	Exhibitor	9,2	13,8	33,3	49,8	9,9	14,8	14,5	21,6	**67,0**	**100,0**
	Art gallery	17,2	52,9	9,3	28,6	1,7	5,2	4,3	13,3	**32,4**	**100,0**
Audiovisual	Prod.	117,6	9,1	983,4	76,2	48,1	3,7	141,8	11,0	**1.290,8**	**100,0**
	Cinemas	26,0	11,9	49,4	22,7	52,3	24,0	90,4	41,5	**218,1**	**100,0**
Total		453,8	13,6	1.781,9	53,4	471,6	14,1	631,3	18,9	**3.338,6**	**100,0**

Note: Orchestras were included in the data of public music programmers and visual arts producers in the data for exhibitors of visual arts for reasons of data confidentiality.

2. Ownership

Agents are considered to be under public ownership when the entities of any legal form have majority Public Administration participation; private ownership corresponds to agents with for-profit business activity; and finally, associations and foundations are private not-for-profit entities.

As in previous editions, private ownership agents dominate (50.5% in 2019). The relative weight of the agents according to their ownership is within parameters very similar to the previous edition of the study (2017).

Figure 8.

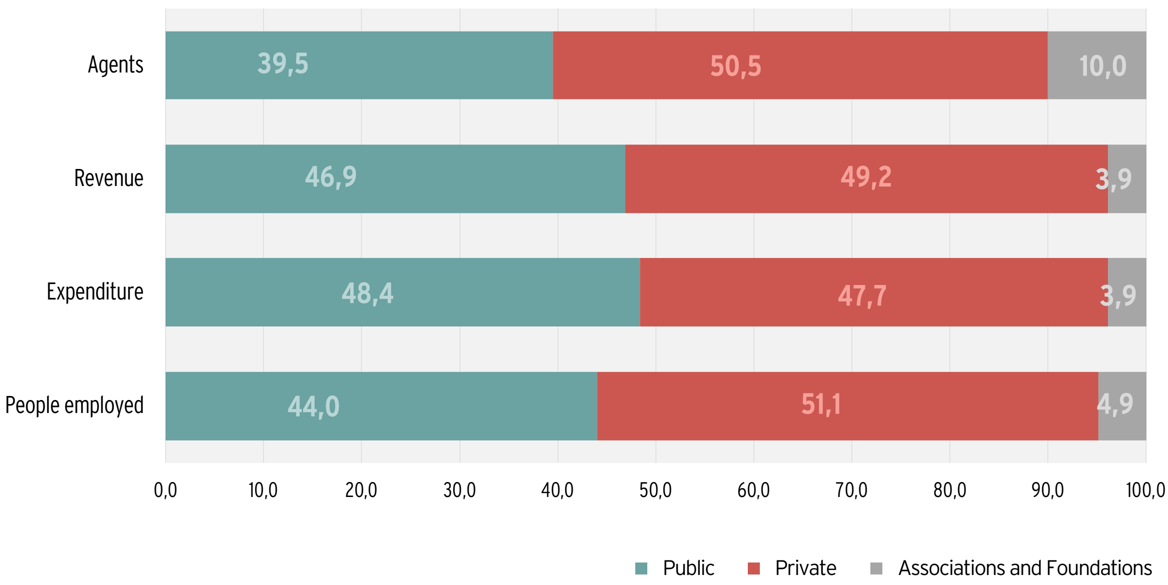
Agents by ownership. Percentages. 2009-2019

From both the economic perspective and the employment perspective, this predominance in the number of private agents is also reflected proportionally. In any case, the public sector shows its economic and employment capacity and if one looks at the third sector, it is observed that its economic dimension and its employment are less than that which would correspond to it.

Figure 9.

Revenue, expenditure, total people employed and agents by ownership.

Percentages. 2019

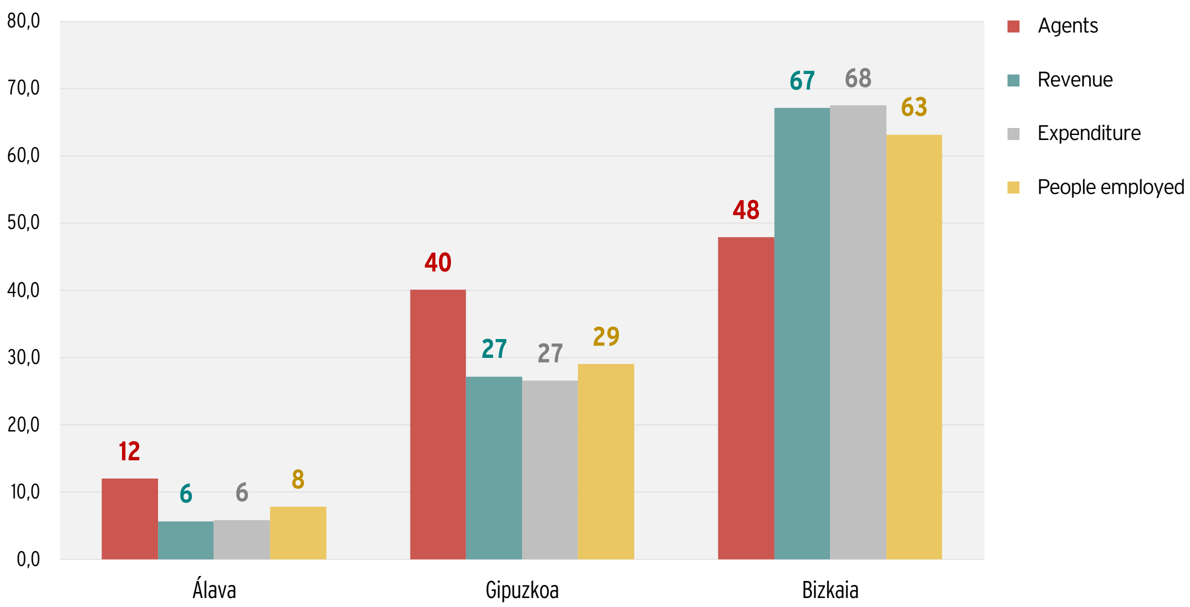


3. Territory

By Historical Territory, we can see a certain balance in terms of the territorial distribution of the cultural fabric (48% of the agents located in Bizkaia; 40% in Gipuzkoa; 12% in Álava) and highlights the power of the agents located in Bizkaia in economic terms (67% of total income) and employment (63% of total jobs).

Figure 10.

Percentage distribution of agents, revenue, expenditure and employed people by Historic Territory. Percentages. 2019



If the cultural density of the three historic Territories is analysed in relation to their population, Gipuzkoa stands out (39.4), ten points above Bizkaia (29.5) and fourteen points above Álava (25.6). Alava's ratio of density of programmers and exhibitors is higher than that of Bizkaia.

Figure 11.

Distribution and ratio per 100,000 inhabitants of programmer and exhibitor agents, shops and producers per Historic Territory.

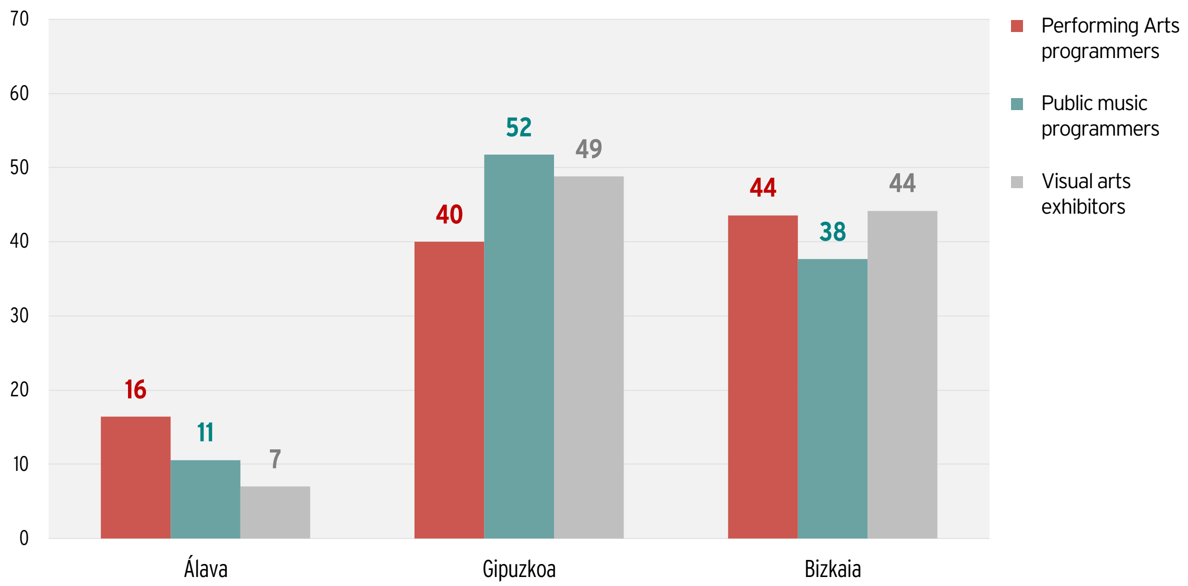
Absolutes and ratio per 100,000 inhabitants. 2019

Agent typology	Álava		Gipuzkoa		Bizkaia	
	Ratio	Freq.	Ratio	Freq.	Ratio	Freq.
Programmers and exhibitors	15,0	49	22,4	160	13,8	157
Stores	3,4	11	6,2	44	5,6	64
Producers	7,3	24	10,8	77	10,1	115
Total	25,6	84	39,4	281	29,5	336

The distribution in detail of the programmers and exhibitors shows the domination of Bizkaia and Gipuzkoa. Around half of music programmer agents and visual arts halls are concentrated in Gipuzkoa (52% and 49%, respectively). Bizkaia has the highest number of performing arts programmers (44.0%). Although in lower percentages, if the peculiarity of the territory is taken into account, this same profile also stands out in Álava (16.0%).

Figure 12.

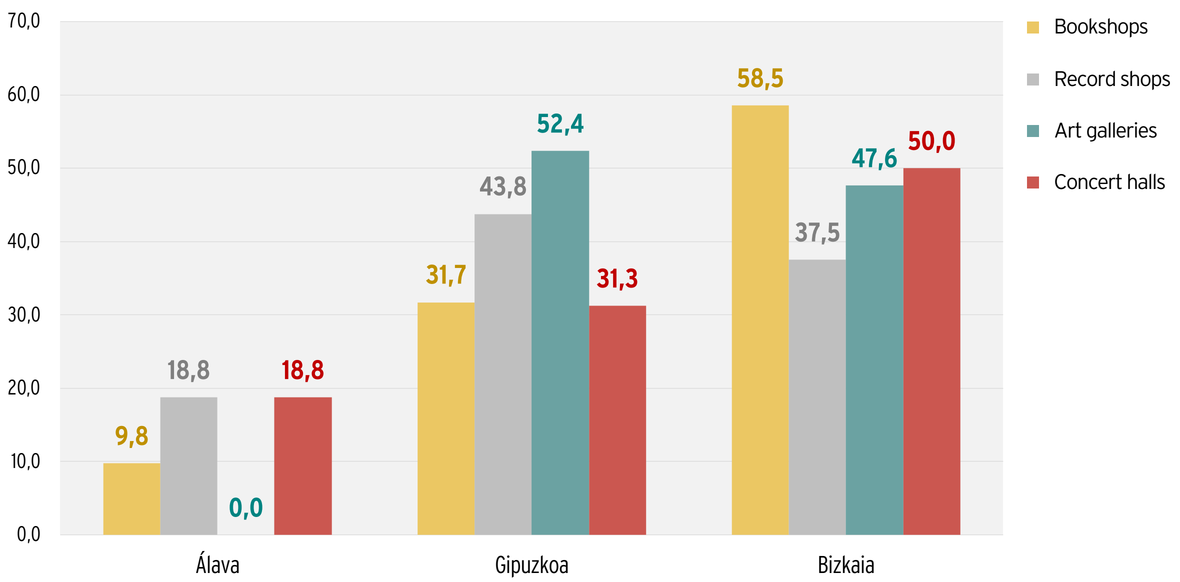
Programmer and exhibitor agents by Historical Territory. Percentages. 2019



Regarding stores, there are differences depending on the territory. We find more than half of the bookstores in Bizkaia and more than half of the art galleries in Gipuzkoa. Half of the concert halls are located in Bizkaia.

Figure 13.

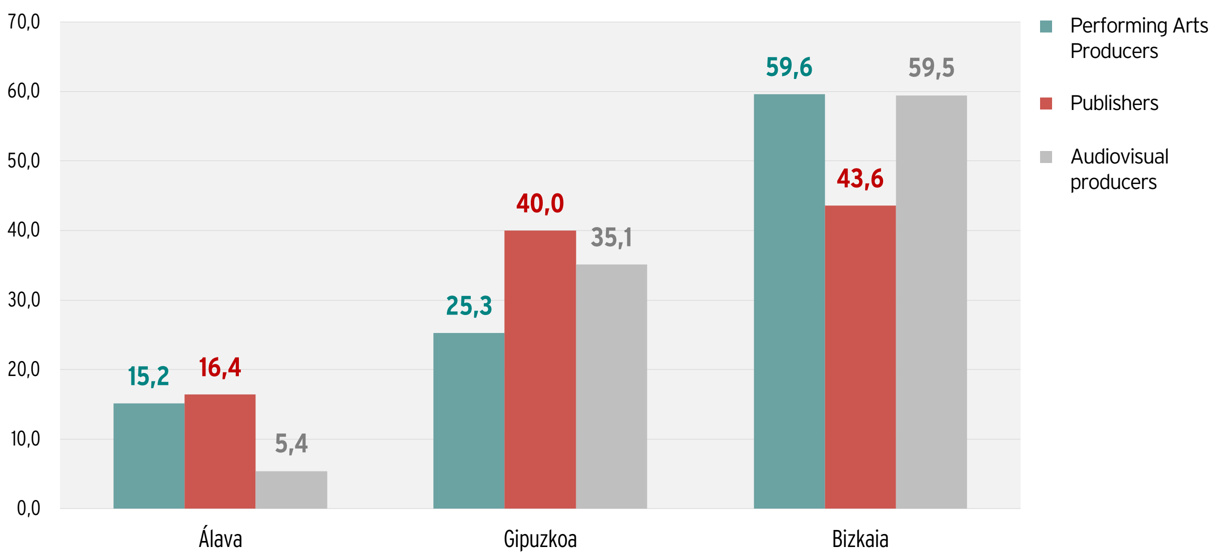
Commercial establishments and concert halls by Historical Territory.
Percentages. 2019

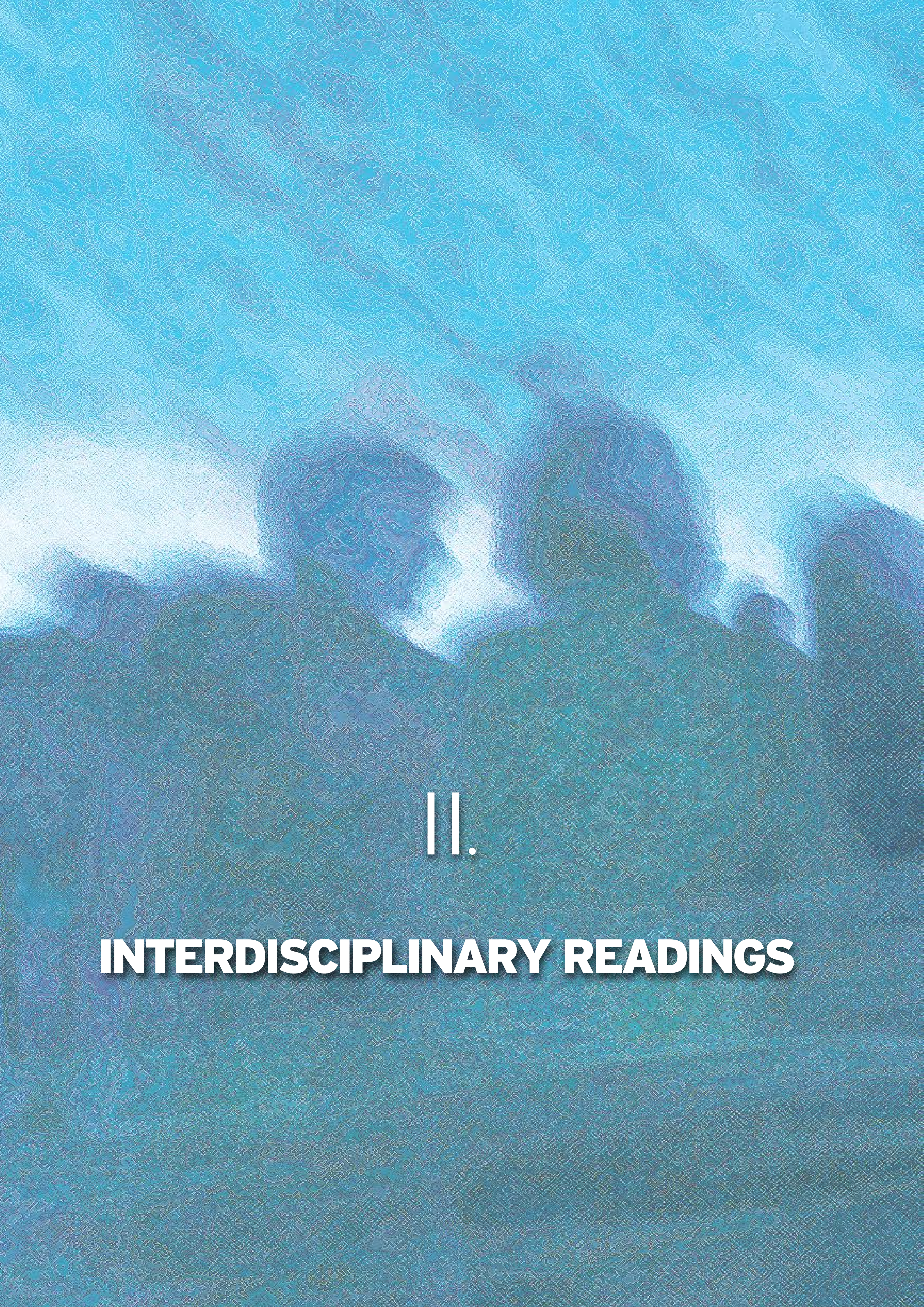


The location of producing agents varies according to the sector in question: in Bizkaia accounts for around 60% of the production of performing arts and audiovisuals; 40% of publishers are located in Gipuzkoa and in Álava the highest percentages are awarded to performing arts companies and publishers (15% and 16%, respectively).

Figure 14.

Producer agents by Historical Territory. Percentages. 2019





II.

INTERDISCIPLINARY READINGS

1. Asymmetries

The intention of this section is to bring to the surface the existing asymmetries in each sector with regard to agents' revenues . To achieve this, the focus is directed towards the group whose revenues are the highest, to discover the impact it has on the sector as a whole. The added data, although necessary to obtain an overall vision, blur the sectoral singularities. This is the reason why, in this chapter, the effect on the whole of each sector of the 20% of agents with the greatest revenues is analysed, applying the 80-20 rule.

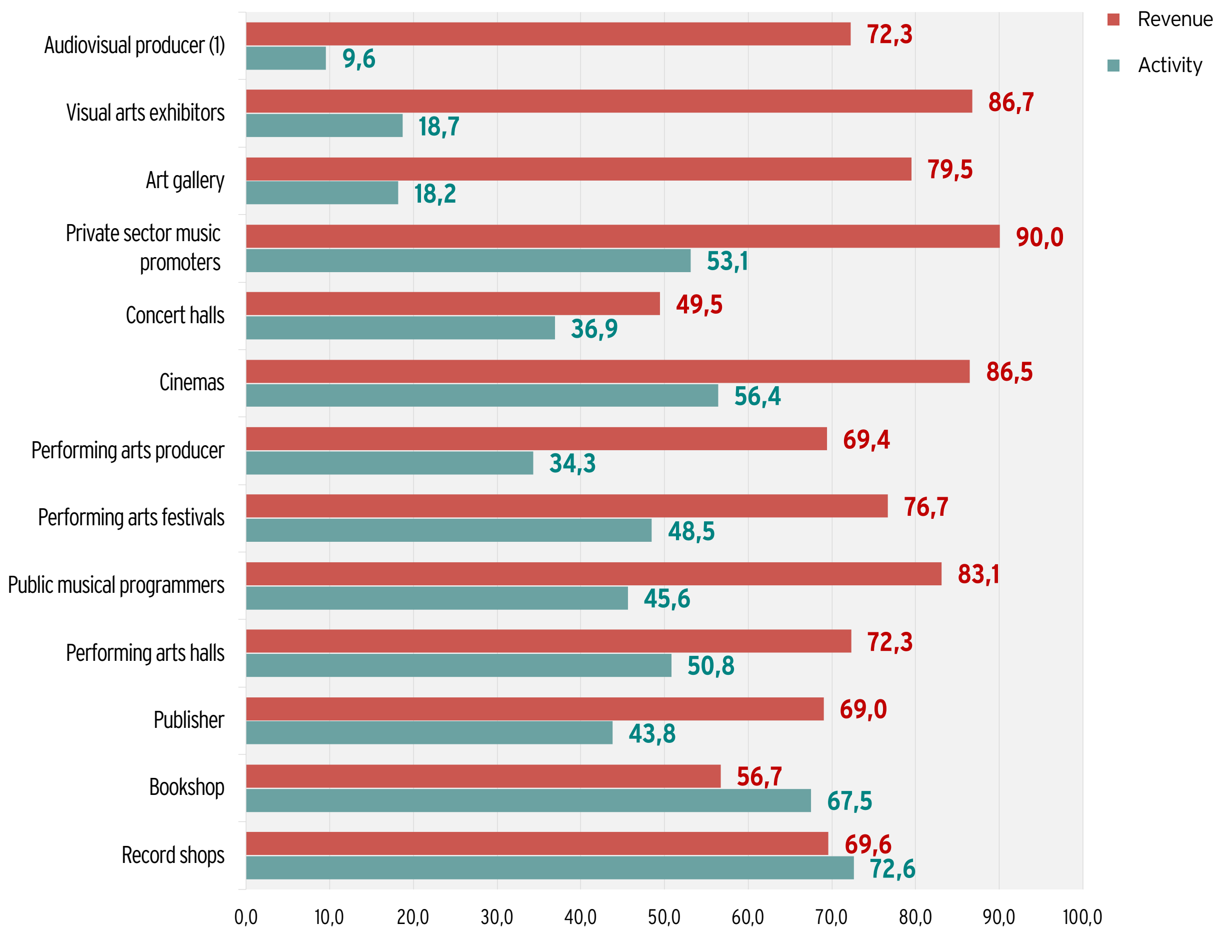
The first conclusion is that the rule is met in practically all sectors: 20% of the agents with the highest income accumulate between 7 and 9 of every 10 euros of the total income, with the exception of concert halls (49.5%) and bookstores, with 56.7%.

However, the fact that the income is concentrated in a small number of agents does not mean that the same is true of their activity. Thus, the peculiarities of their activities and the structure of their businesses emerge. The area where there is a correlation between the concentration of income and activity is, logically, cultural commerce: if high income is obtained, it is because many units are sold, be they books or records.

In the rest of the sectors, activity follows a logical subject to the usual rhythm of production and programming and the dimension of income does not necessarily imply more activity, but is associated with the characteristics of the productions (more expensive, complex and large) or programming (shows or concerts with more important artists, international proposals or exhibitions of established artists).

Figure 15.

League table of agent typology by degree of concentration of revenue and volume of activity* of the 20% of agents with the greatest revenue. Percentage. 2019



* Record shops and bookshops = sales; publishers = titles published as new editions; performing arts = events; music = concerts programmed; audiovisual producers = productions; cinemas = films programmed; visual arts = exhibitions).

(1) Without EITB.

Performing arts producers

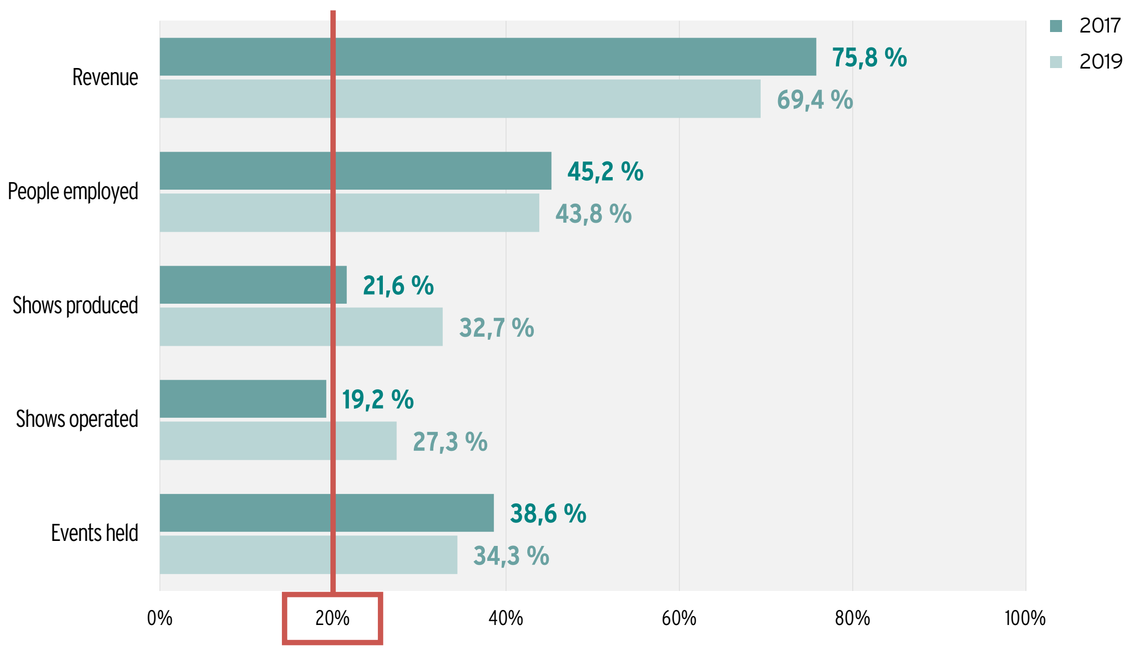
The 20 companies that account for 20% of the performing arts producing agents with the highest income generate 69.4% of the total income of the sector (14.3 million euros), a weight lower than that achieved in 2017.

This trend is reflected in employment: the weight of this leading group in employment as a whole stands at 43.8%, slightly below that obtained in the previous edition.

Regarding production activity, the dynamics is the opposite: in 2019 the shows produced and exploited by this group of agents were close to 30% of the total in the sector. The indicator that has the most variation with respect to the previous edition is shows produced, with an increase of 11 points. In terms of functions, they are slightly down compared to 2017.

Figure 16.

Relative weight of the 20% of performing arts producers with greater revenues in the sectoral indicators. 2017-2019



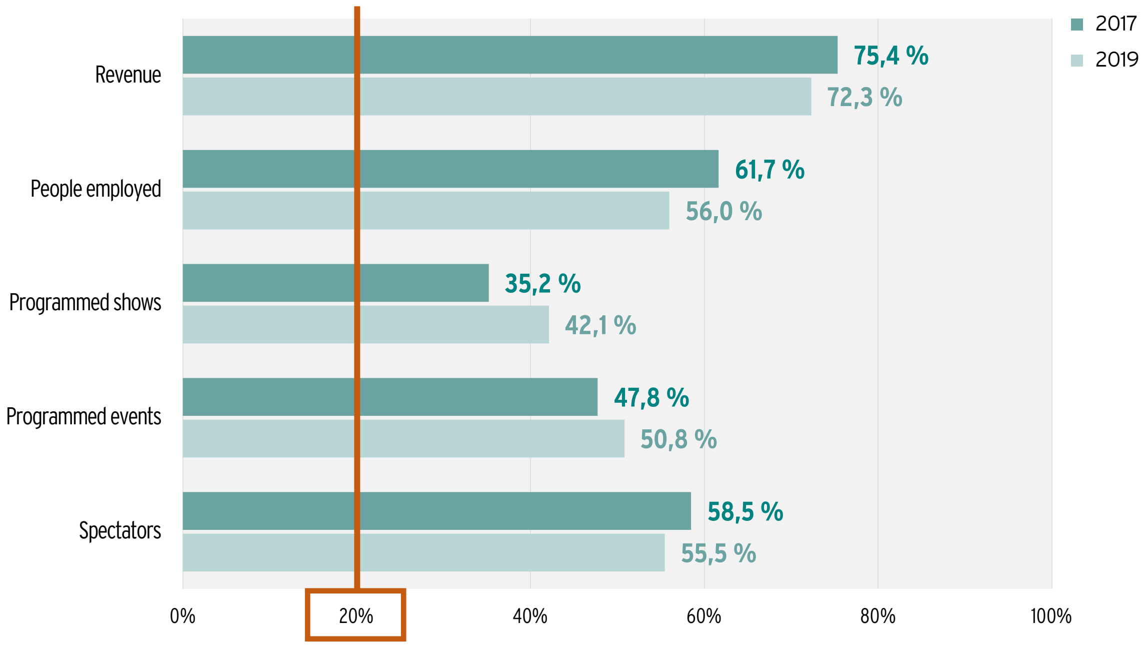
Performing arts programmers

The characteristics of the theatres attracting a greater volume of revenue explain the data: they are big facilities, located in capital cities and the main municipalities.

Large performing arts halls in terms of income accumulate 72.3% of the income of theatres as a whole, 56.0% of employment and 55.5% of spectators.

Figure 17.

Relative weight of the 20% of performing arts programming halls with greater revenues in the sectoral indicators. 2017-2019



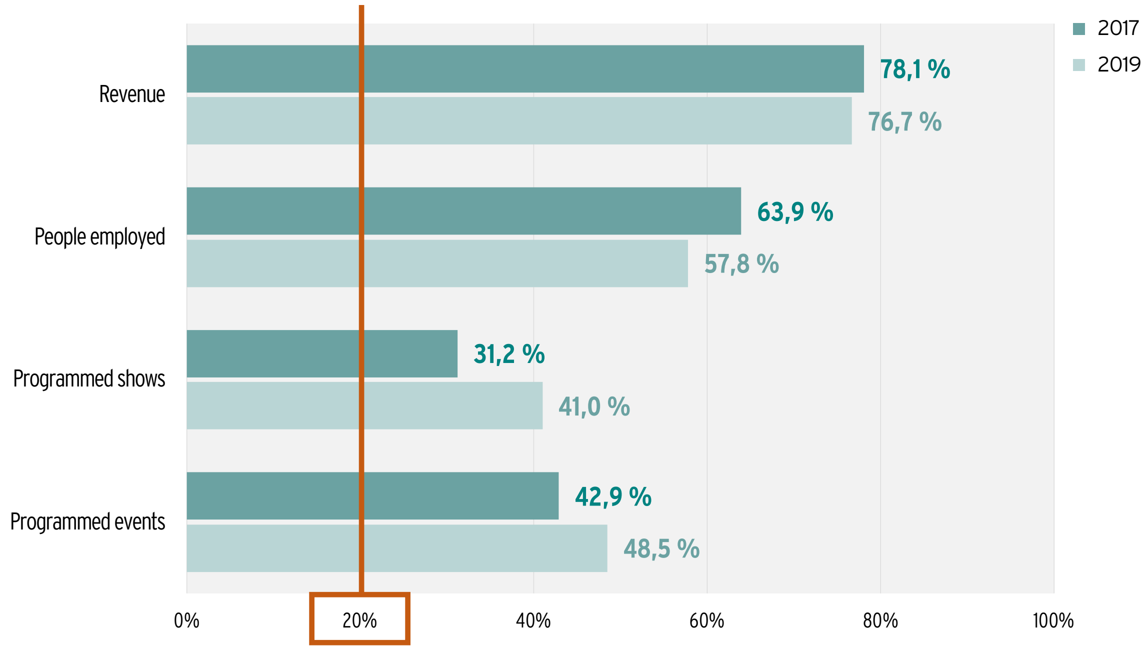
The asymmetry of performing arts festivals is worthy of note, the 9 festivals that accrue a greater volume of revenue concentrate 76.7% of the total revenue, which is almost 9 million euros in income.

In employment, the downward trend started in 2017 is sharpening: the weight of this small group of festivals is reduced to 57.8% of working people.

Regarding activity, the weight of the shows programmed in relation to the 2017 edition increased by 10 points, standing at 41%, and by 6 points that of the functions programmed in 2019.

Figure 18.

Relative weight of the 20% of performing arts festivals with greater revenues in the sectoral indicators. 2017-2019



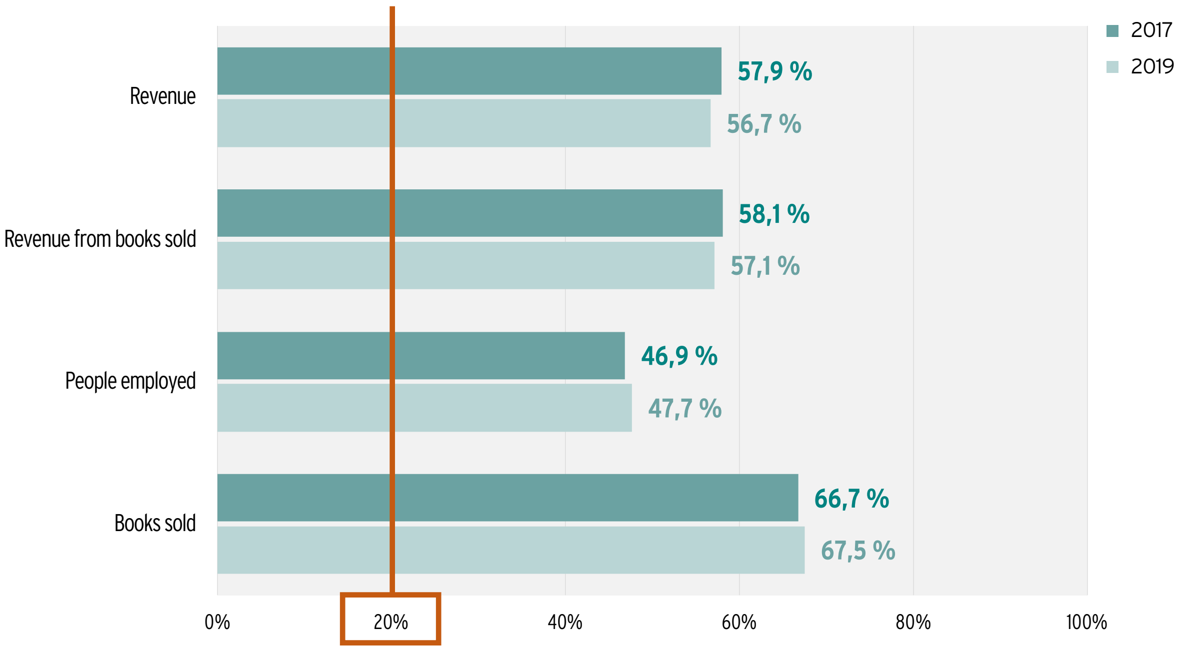
Bookshops and publishers

Bookstores present a situation very similar to the 2017 edition in all indicators. This group of establishments with the highest income in the sector accumulate around 57% of the income, both from the total income (of which they obtain 56.7%), and from those that come exclusively from the sale of books (58.1%). It should be noted that, although many belong to chains or large bookstores, there are also independent bookstores.

Their weight in the overall employment of the sector represents 47.7%.

Figure 19.

Relative weight of the 20% of bookshops with greater revenues in the sectoral indicators. 2017-2019



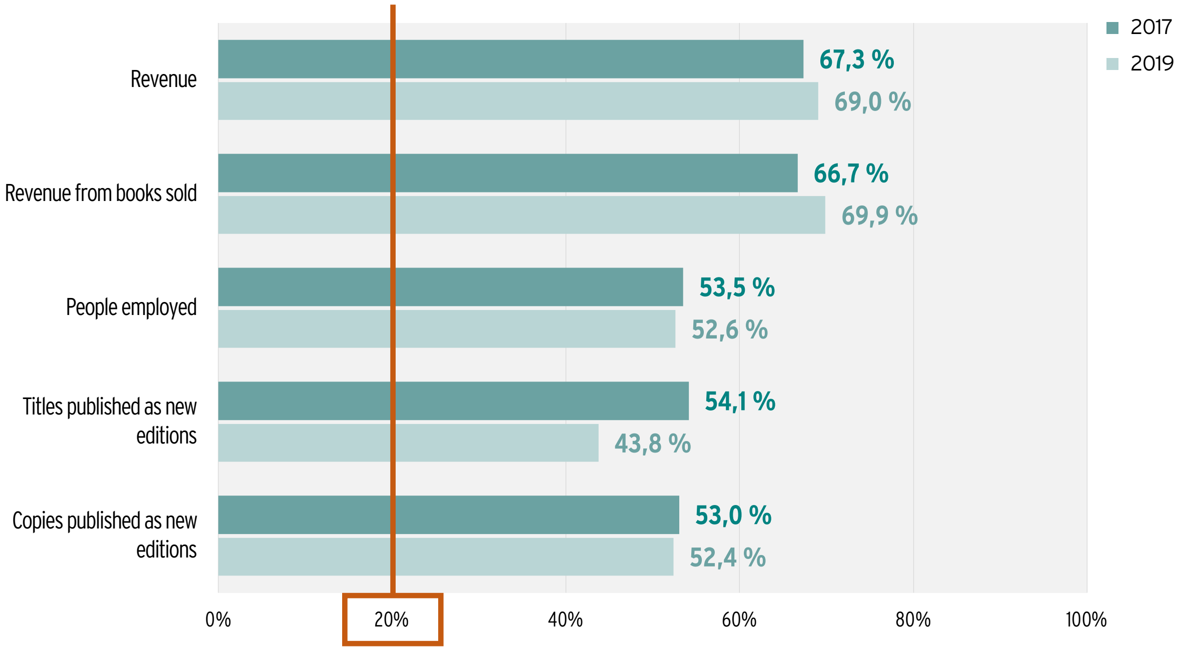
The publishers that account for 20% of the agents with the highest income add up to almost seven out of every ten euros of the total income of the sector.

Regarding employment, it is situated in parameters similar to those of 2017, and they continue to employ half of the sector (52.6%).

Their production shows a stable trend in terms of copies published as new books, despite the fact that titles published also as new books have seen their weight in the overall production of the sector reduced by around ten points (from 54.1% in 2017 to 43.8% in 2019), which indicates that larger runs are made.

Figure 20.

Relative weight of the 20% of publishers with greater revenues in the sectoral indicators. 2017-2019



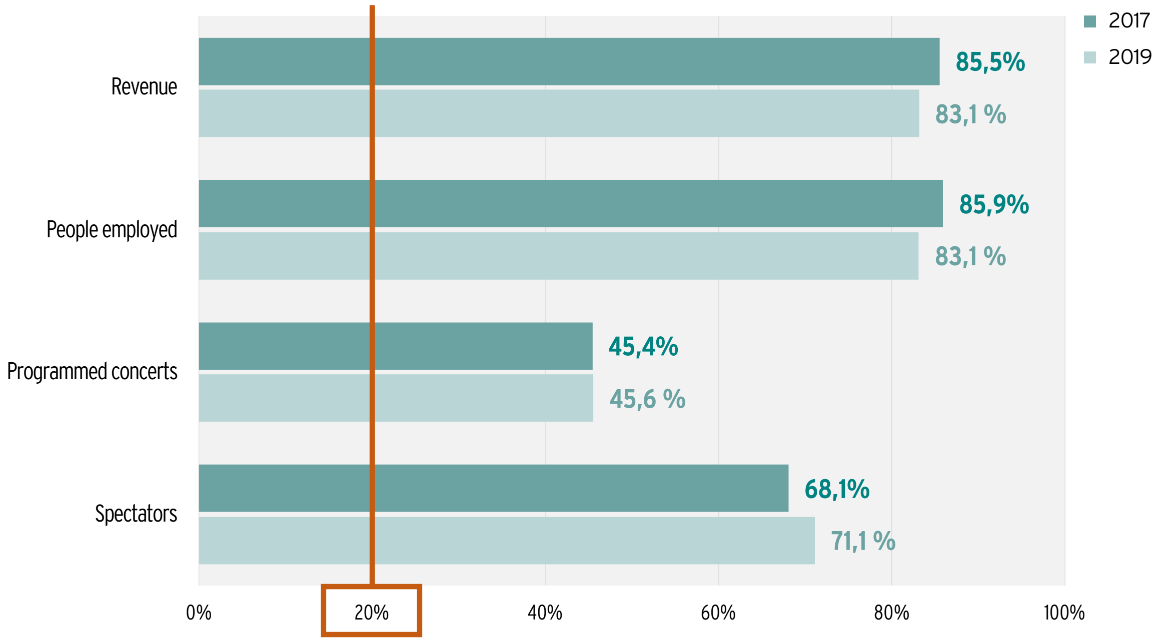
Music programmers

The asymmetry of public music programmers is high: 20% of public music programmers with the highest income (including orchestras) accumulate 83.1% of total income and occupy 83.1% of employment.

As for programmed concerts, their weight is kept at the values of previous editions of the statistics (45.6%) and they still attract 7 out of every 10 of the total number of spectators. (71.1%).

Figure 21.

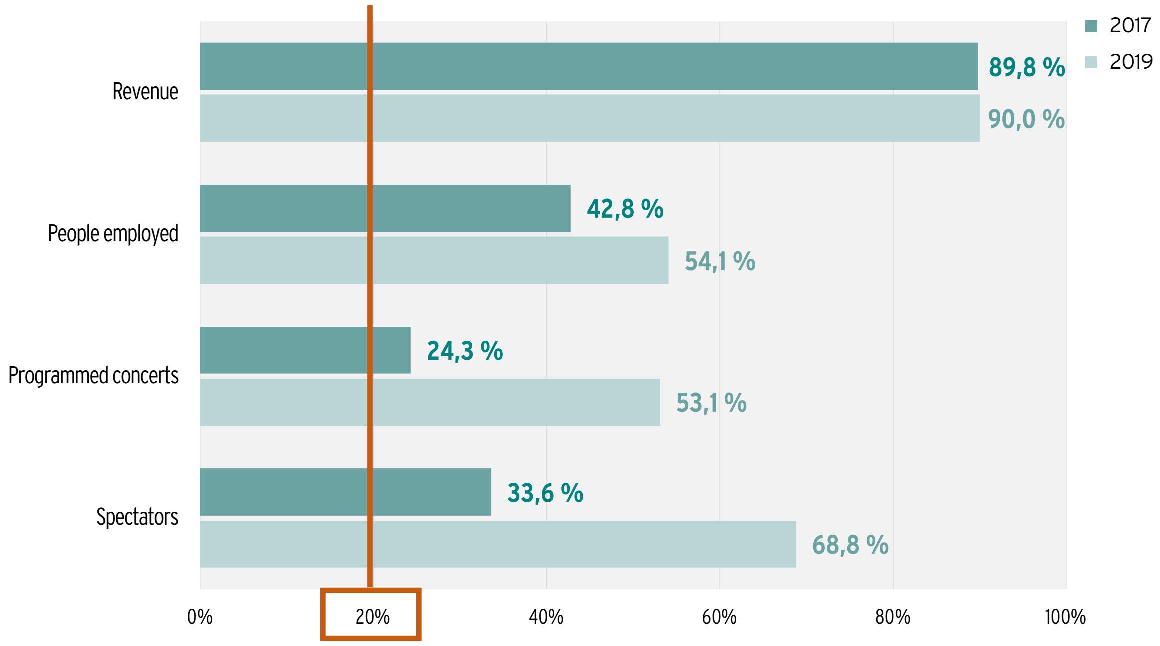
Relative weight of the 20% of public music programmers with greater revenues in the sectoral indicators. 2017-2019



The asymmetry between private promoters is the highest in the group of sectors. The private agents with the highest volume of income account for 9 out of every ten euros of the total income of this profile of programmers. Its increase in the rest of the indicators in this 2019 edition is also very significant: its weight in employment rises by twelve points, that of the concerts programmed increases significantly, its audience is doubled.

Figure 22.

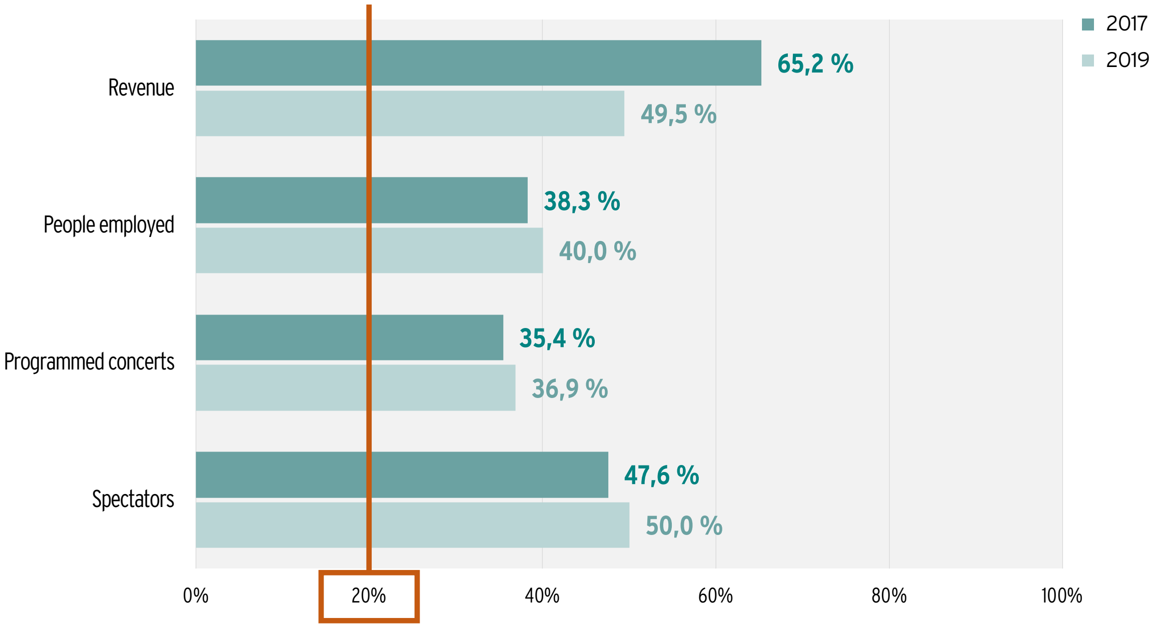
Relative weight of the 20% of music private promoters with greater revenues in the sectoral indicators. 2017-2019



The theatres with the highest income have reduced their weight in this edition, to stand at half of the total income of this profile of agents (49.5% of the total). Both their weight in employment and in the concerts they program reach around 40% of all music venues. Regarding the public that they gather, their activity attracts half of the spectators of the whole sector.

Figure 23.

Relative weight of the 20% of concert halls with greater revenues in the sectoral indicators. 2017-2019

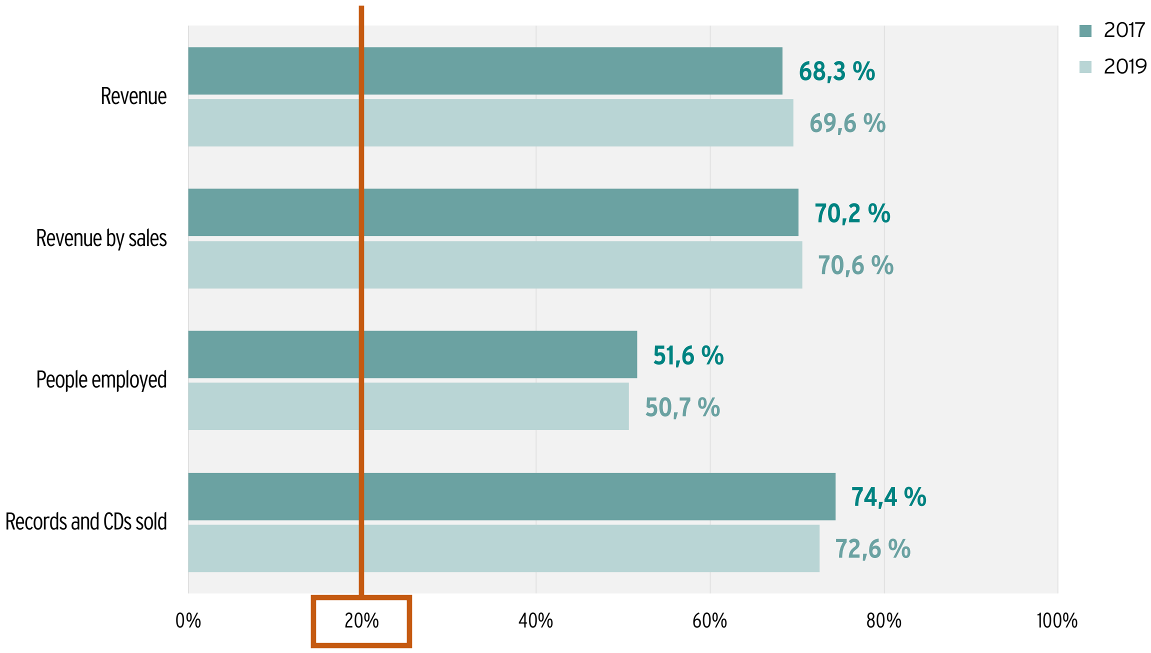


Record shops

As seen in previous editions, the weight of the main record shops in the overall sector is situated in all indicators at around 70%, except in employment, with a relative weight of 50.7%.

Figure 24.

Relative weight of the 20% of record shop agents with greater revenues in the sectoral indicators. 2017-2019



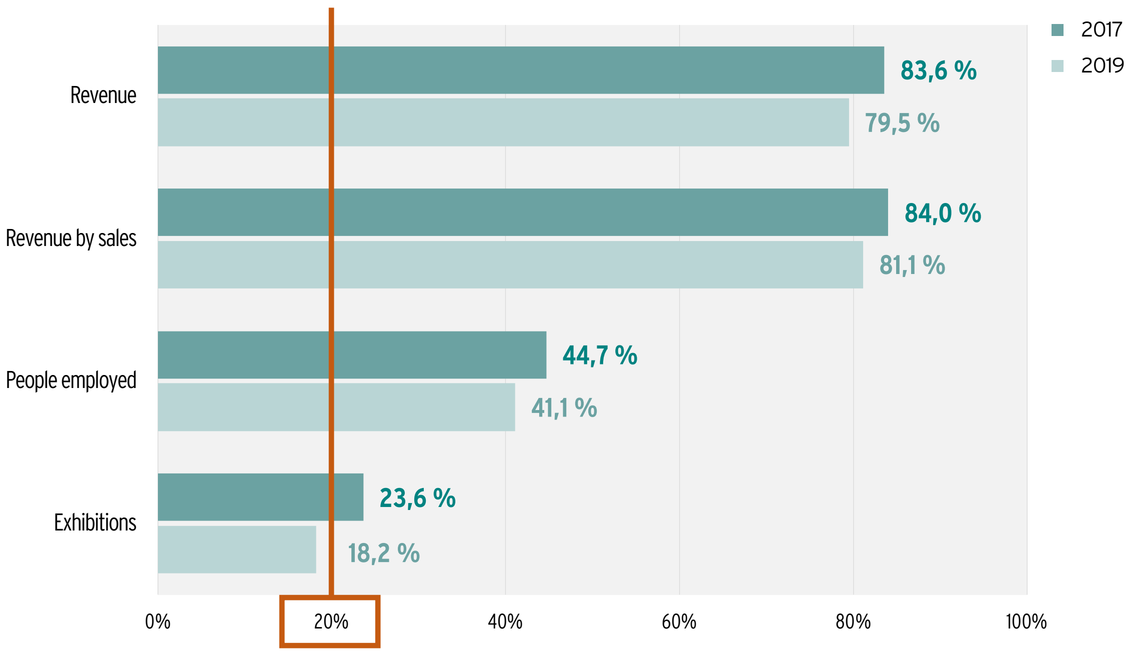
Agents of visual arts

The art galleries with most weight in the sector accrued around 80% of global revenue and of revenue by sales.

As seen in previous editions, the sector's own features with regard to employment and the exhibition season they promote make their weight with regard to employment (41.7% of the total) and exhibitions held (18.2%) situate itself at levels more in accordance with those corresponding to the number of agents.

Figure 25.

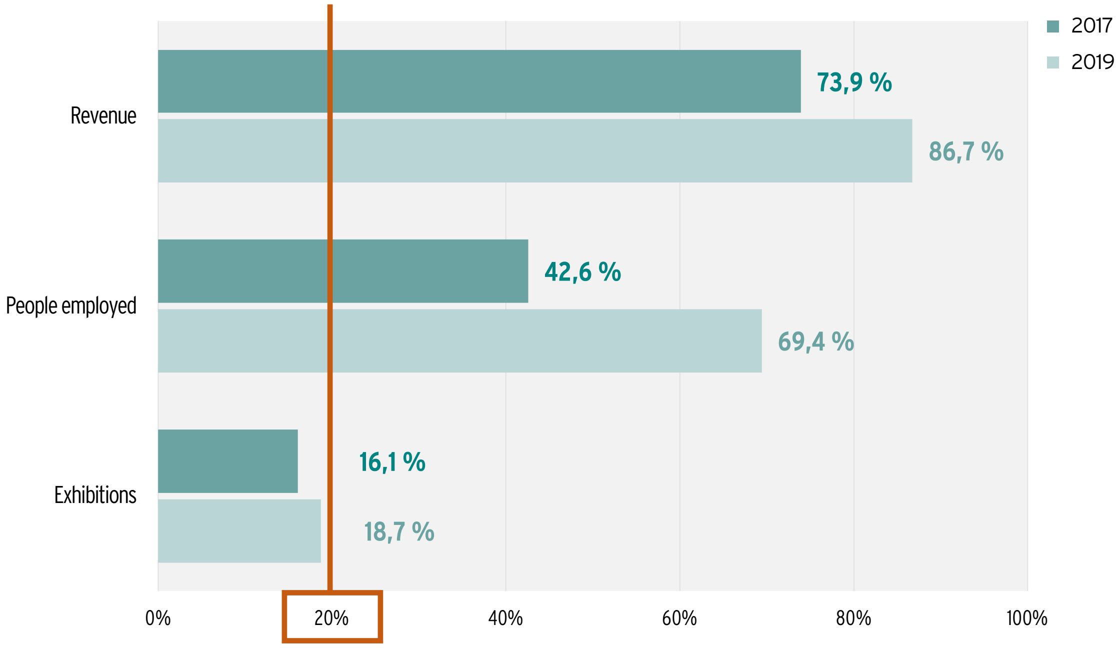
Relative weight of the 20% of art galleries with greater revenues in the sectoral indicators. 2017-2019



With regard to large exhibition halls, it is worth remarking that the asymmetry increases from the perspective of revenue and employment. Exhibition halls with the highest volume of revenue account for 86.7% of total revenue and 69.4% of employment.

Figure 26.

Relative weight of the 20% of exhibition halls with greater revenues in the sectoral indicators. 2017-2019



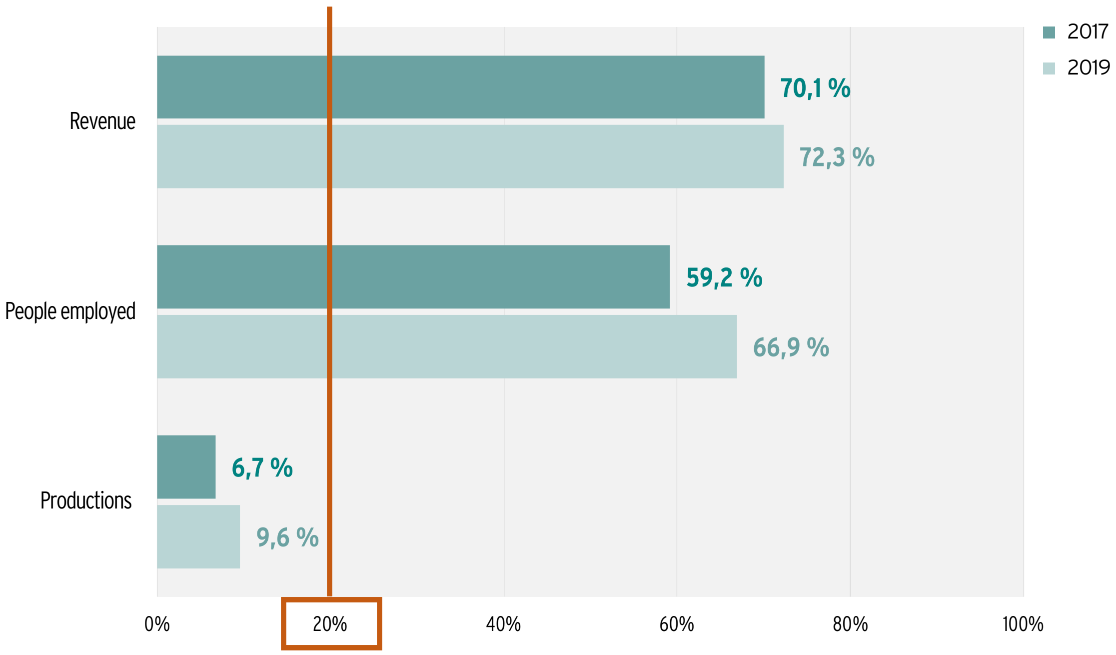
Agents of the audiovisual sector

EITB has been excluded for the analysis of asymmetry of audiovisual producers, given that its size generates an effect on the data which makes it difficult to characterise the rest of the sector. Taking into account that exclusion, the group of agents having 20% of the greater revenue concentrates 72.3% of revenue. This group of producers employs 66.9% of the sector.

Logically, with regard to productions, asymmetry is almost non-existent, the weight of the activity is 9.6%. As was highlighted in the previous edition, the reduced weight in total productions indicates that the big producers carry out few, but big, projects.

Figure 27.

Relative weight of the 20% of audiovisual producers with greater revenues in the sectoral indicators (1). 2017-2019

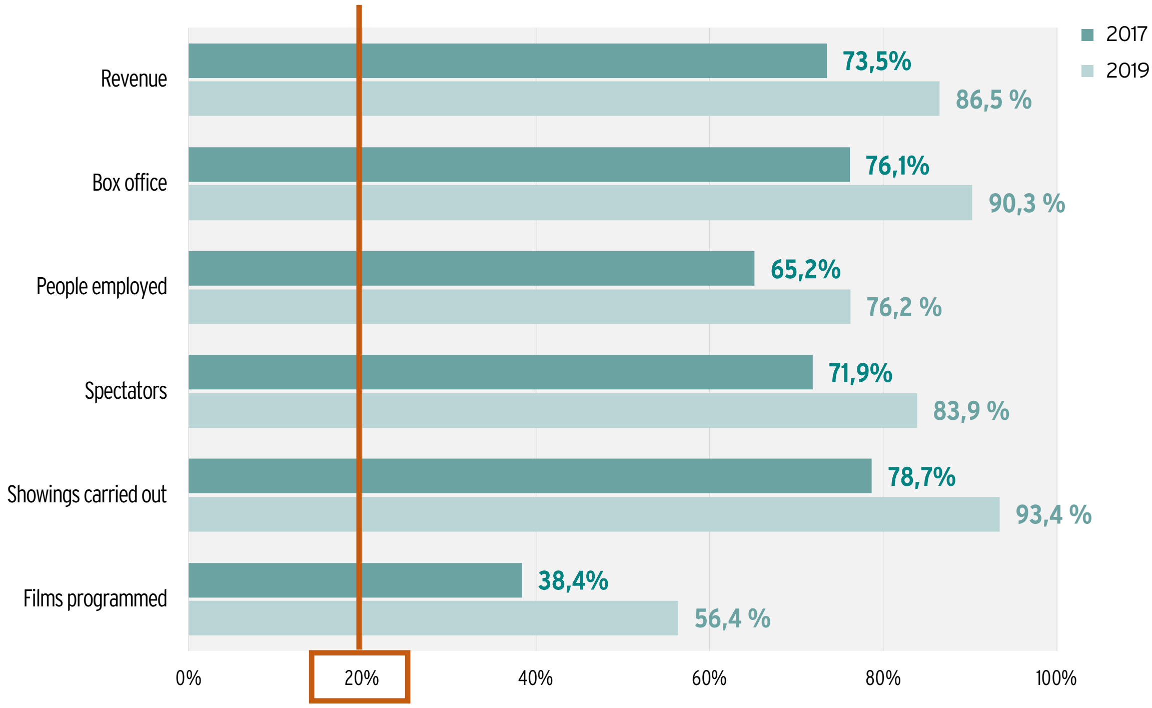


(1) Excluding EITB

Regarding cinemas, in 2019 a considerable increase in asymmetries is observed in all indicators: 20% of cinemas accumulate 86.5% of revenue and 90.3% of box office revenue ; they employ 76.2% of working people and attract 83.9% of viewers. They achieve this due to the fact that 90.3% of the showings of all cinemas are scheduled, although the films that can be seen at these cinemas account for 53.4% of the total. This indicates that they are the ones that have been on the bill for the longest and, therefore, the biggest blockbusters.

Figure 28.

Relative weight of the 20% of cinemas with greater revenues in the sectoral indicators. 2017-2019



2. Live culture versus reproducible culture

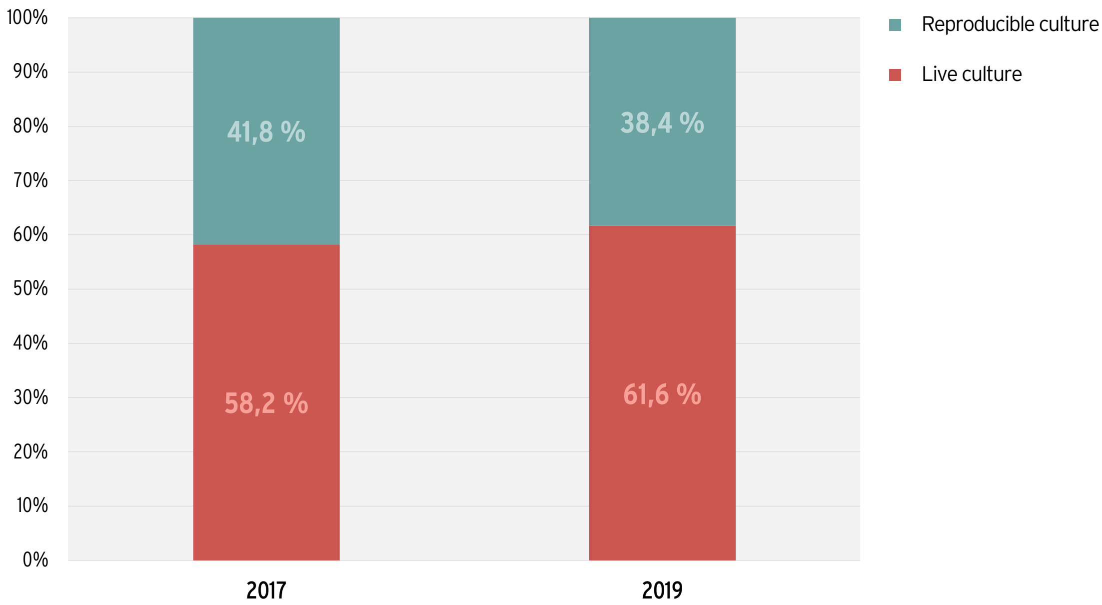
Live culture comprises the set of expressions tied to performing arts, music and the visual arts enjoyed live, of a different nature from products generating reproducible culture, represented by the classic cultural industries of books, records and audiovisuals.

Regarding the map of agents, there are no significant differences between the last two editions of the statistic. The ratio between the agents belonging to reproducible culture and the agents of live culture is 38.4% versus 61.6%, respectively.

Figure 29.

Distribution of live culture agents and reproducible culture agents.

Percentages. 2017-2019



Although in the map of agents those corresponding to live and on-site culture predominate, their weight in income and employment is inversely proportional. Around 6 out of every ten euros and jobs generated by the cultural sectors analysed in the study correspond to the cultural industries of books, records and audiovisuals. It should be noted that live culture has been gaining ground since 2009, but at a very slow rate.

In this latest edition of the statistic, revenues from reproducible culture reached 278 million euros; in the case of live culture, they represent 171.2 million euros.

In 2019, the employment of reproducible culture represents 58.1% and that of live culture, 41.9% (1,940.4 jobs compared to 1,398.1, respectively).

Figure 30.

Revenue by live culture agents and reproducible culture agents.

Percentages. 2017-2019

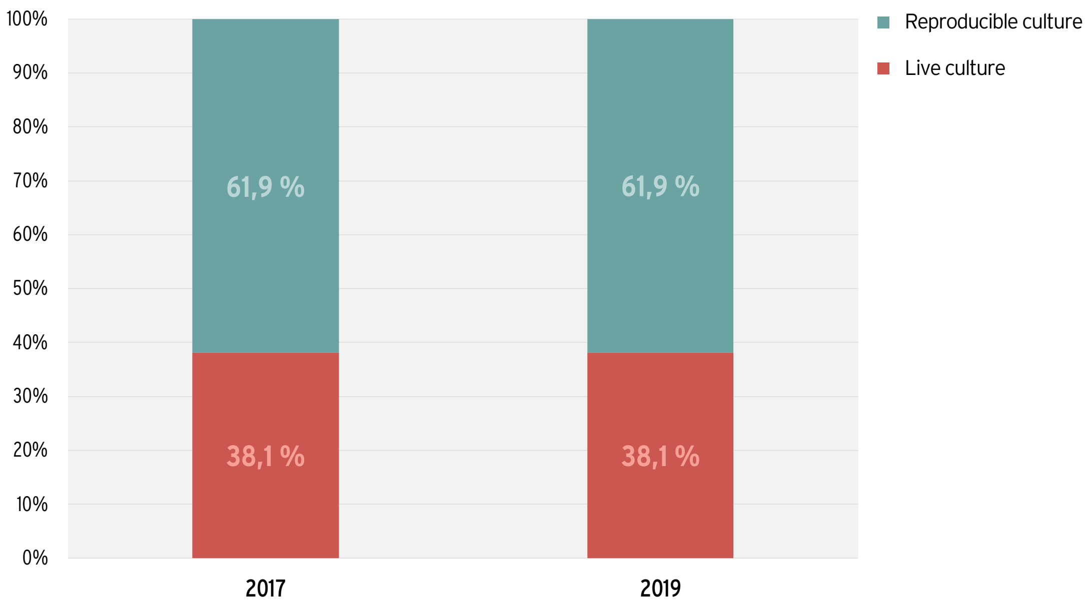
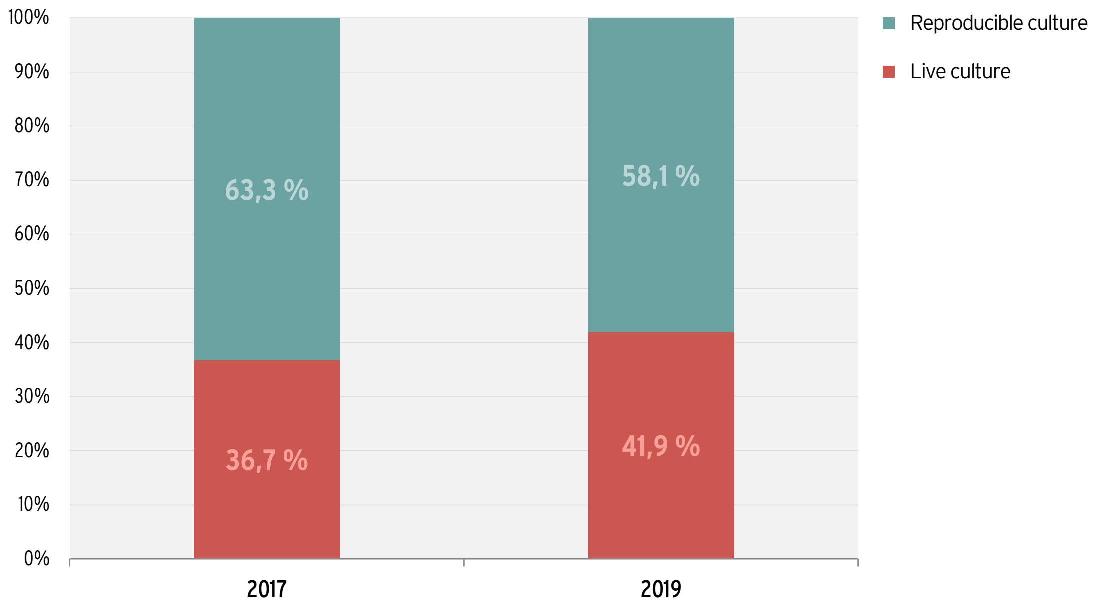


Figure 31.

People employed equivalent to full-time annualised by live culture agents and reproducible culture agents. Percentages. 2017-2019

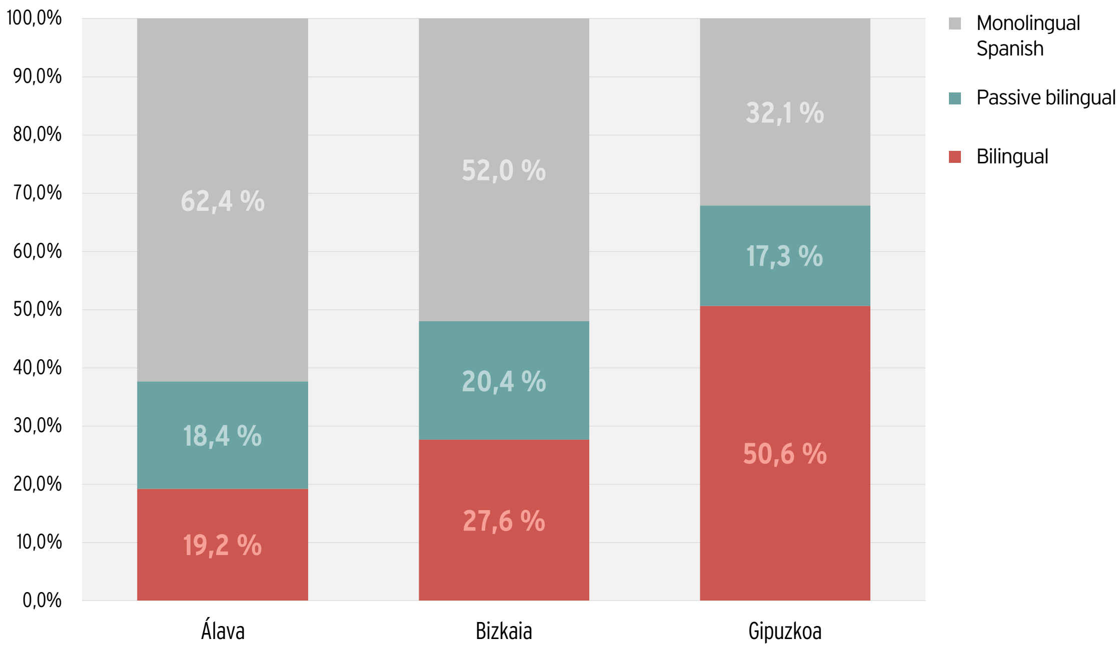


3. Culture in the Basque Language

As was presented in the last edition of these statistics and this self-same report, Gazes, in order to be able to analyse culture in the Basque language, we need to be aware of the linguistic reality of the Autonomous Community of the Basque Country. The latest data published by the Department of Culture and Language Policy show that 33.9% of the population over 16 years old is bilingual; 19.1% is passive bilingual; and 47% monolingual Spanish. There are great differences between territories; half the population of Gipuzkoa is bilingual (50.6%). In Bizkaia, a little more than a quarter of the population in bilingual (27.6%), and in Álava, a fifth of the population is bilingual (19.2%).

Figure 32.

Distribution of the population of the CAE by knowledge of Basque language and Historic Territory. Percentages. 2016

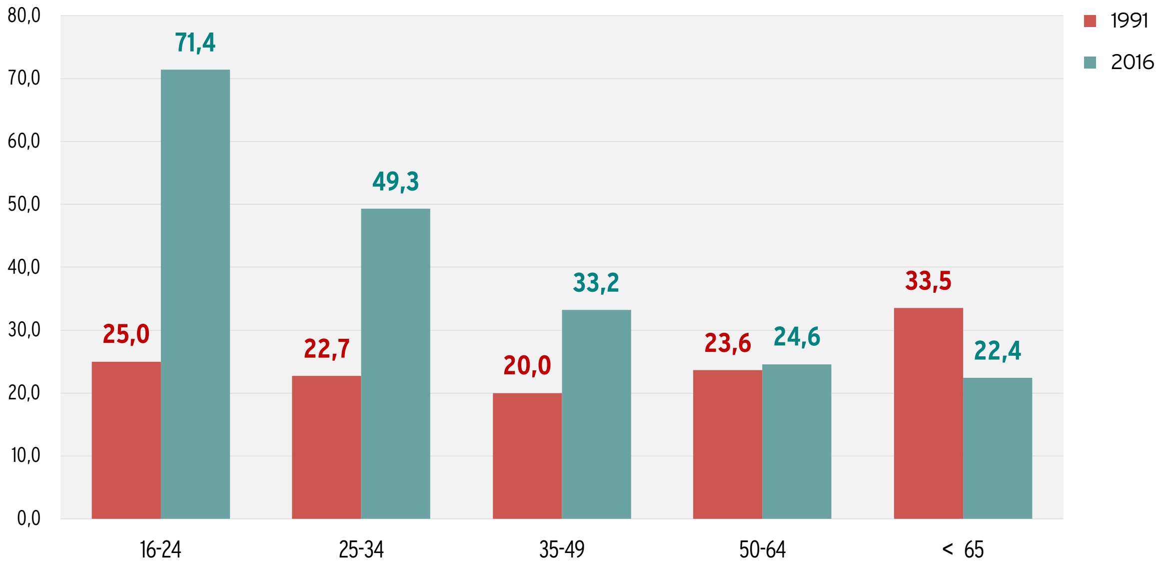


Source: VI Sociolinguistic survey of the Autonomous Community of the Basque Country. Department of Education, Linguistic Policy and Culture of the Basque Government, Government of Navarre and Euskararen Erakunde Publikoa.

Distribution by age shows the weight of the Basque-speaking population between those younger than 35 years old: 71.4% of the population between 16 and 24 years old is bilingual, and almost half the population between 25 and 34 years old. Evolution data regarding the year 1991 underline that the increase in knowledge of the Basque language is down to the progress made by the youngest part of the population.

Figure 33.

Distribution of the bilingual population by age. Percentages. 2016



Source: VI Sociolinguistic survey of the Autonomous Community of the Basque Country. Department of Education, Linguistic Policy and Culture of the Basque Government, Government of Navarre and Euskararen Erakunde Publikoa.

This linguistic reality generates a potential market for cultural offerings in Basque highly conditioned by the variables of age and territory. This has an impact on the genres and typology of productions created and in the characteristics of the offer programmed depending on the territorial context.

Basque in performing arts

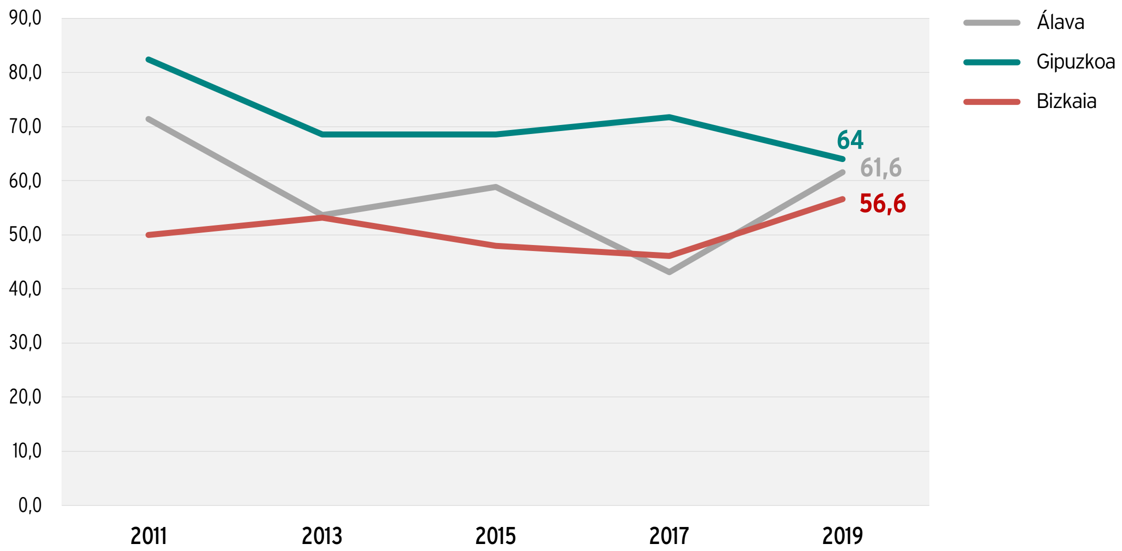
Unlike in previous editions of the study, when territorial differences were observed both in the production and in the programming of performing arts proposals in Basque, in 2019 a confluence in the features of the three territories is perceived.

If production is analysed, the first thing that stands out is that the level of productions in Basque or bilingual productions reaches close to 60% of the total (59.6%, with 85 productions in absolute terms). Of these 85 productions, 6 out of 10 are made only in Basque (63.5%) and the rest correspond to shows with a double version.

The evolution of the presence of Basque in the production of performing arts in the different territories shows that Gipuzkoa has always been situated at higher levels than the rest of the territories, that Álava is the territory that presents the most variations and that Bizkaia has registered a slight upward trend. In any case, what is remarkable in this edition is that there is a confluent dynamic, with production levels of 64% in Gipuzkoa, 61.6% in Álava and 56.6% in Bizkaia.

Figure 34.

Evolution of the presence of Basque in performing arts productions (1). 2009-2019



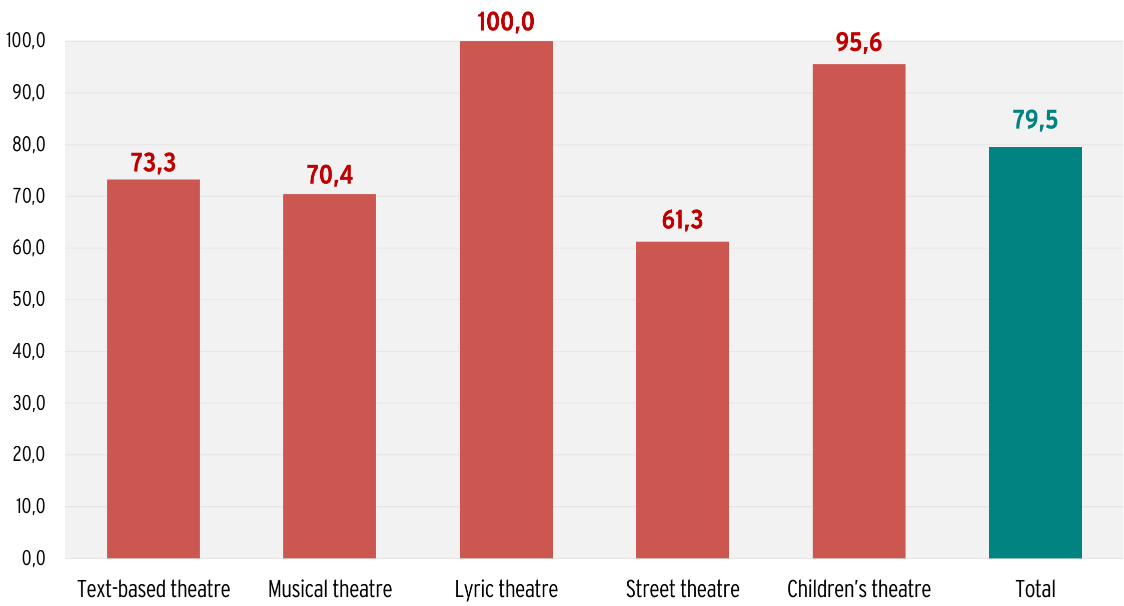
(1) Productions which are carried out in Basque and those with versions in both Basque and Spanish are counted.

Analysing only theatre production in Basque, there is a phenomenon worthy of comment: if at the beginning of the last decade versions in both languages predominated, at the end of the decade, the majority are productions whose text is only in Basque (63.5% in 2019).

Talking about the differences according to genre, Basque predominates in all kinds of productions. Children's theatre practically monopolises (95.6%), in text theatre, it reaches 73.3% and in street theatre, 61.3%. It also stands out that the two lyric theatre productions are in Basque, and that in musicals, 70.4% of the productions are also in Basque.

Figure 37.

Theatre production in Basque (1) by typology. Percentages. 2019



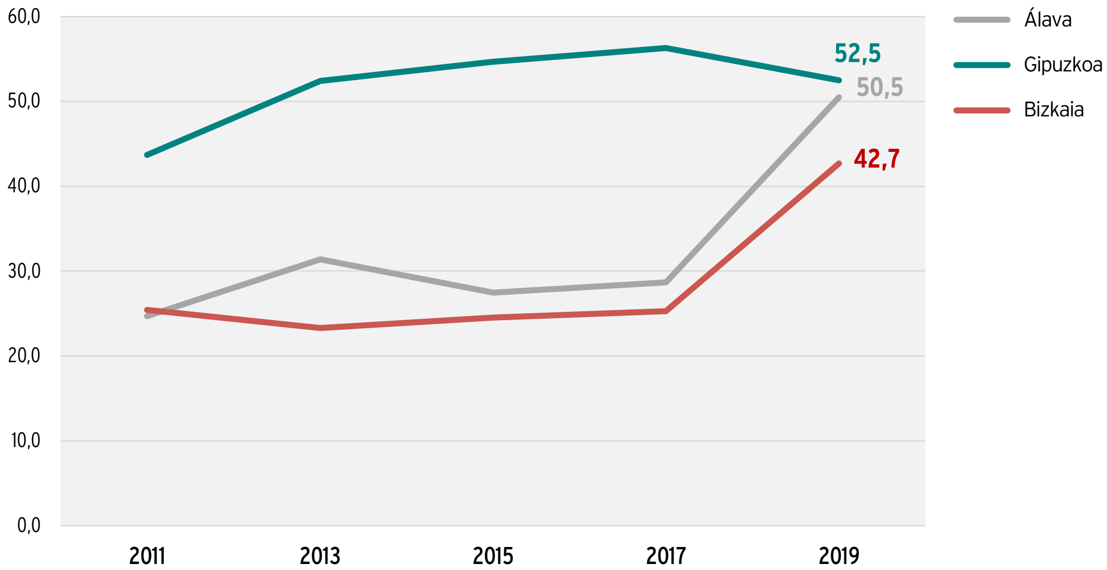
(1) Productions which are carried out in Basque and those with versions in both Basque and Spanish are counted.

As far as performing arts programming is concerned, 48.2% of performances are carried out in Basque, of which 75.7% take place in halls and 24.3% in festivals. Although the fluctuations in the period under analysis are not as remarkable as they are in productions, it is worth pointing out the ascending trend in the programming in Basque since 2011: 2011, 30%; 2013, 33.4%; 2015, 34.9%; 2017, 37.7%.

If we focus our gaze on the presence of Basque in each territory, we can see the same trend towards convergence between the three registered in production. In Gipuzkoa, the offer in Basque reaches 52.5%; in Álava, it rebounded to 50.5%; and, in Bizkaia, it also rises to 42.7%.

Figure 38.

Evolution of the presence of Basque in performing arts programming by Historical Territory. Percentages. 2009-2019



The profile of performing arts exhibitors determines the characteristics of their programming and, therefore, also affects the presence of proposals in Basque. Among the different performing arts halls, the weight of performances in medium-sized halls and, especially, the smallest halls, stands out. In the former, almost 4 out of each 10 performances are in Basque, and in the latter, 6 out of every 10. Their presence at festivals has also increased in recent years: in 2019, 4 out of 10 performances were in Basque (in 2017, 3 out of 10 and in 2015, 1.5 out of 10).

Figure 39.

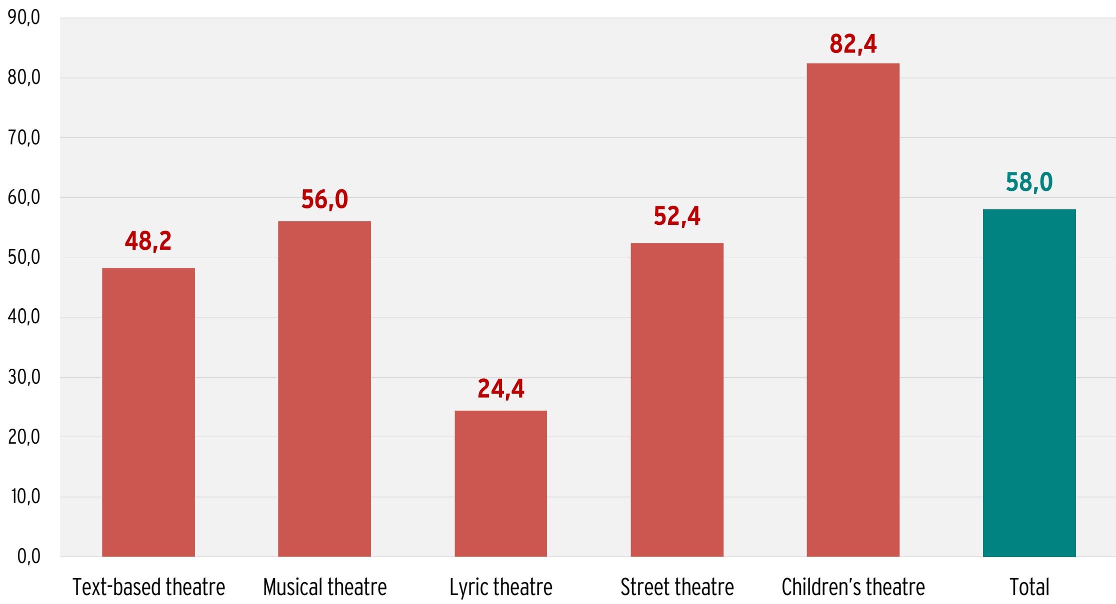
Performances in Basque programmed by performing arts programmers, by typology. Absolutes, percentages and average of performance by hall. 2019

Agent typology	Performances in Basque			Total of performance
	Freq.	%	Average	Freq.
Large halls	52	8,1	13,1	645
Medium-sized halls	829	39,1	18,0	2.121
Small halls	427	66,7	11,2	641
Total halls	1.697	49,8	17,7	3.407
Festivals	544	43,8	12,4	1.243
TOTAL	2.241	48,2	16,0	4.650

As in productions, children's theatre is some distance ahead of the rest (82.4%), followed by musical theatre (56.0%), street theatre (52.4%) and text-based theatre (48,2%). The presence of lyrical theatre in Basque reaches 24.4%.

Figure 40.

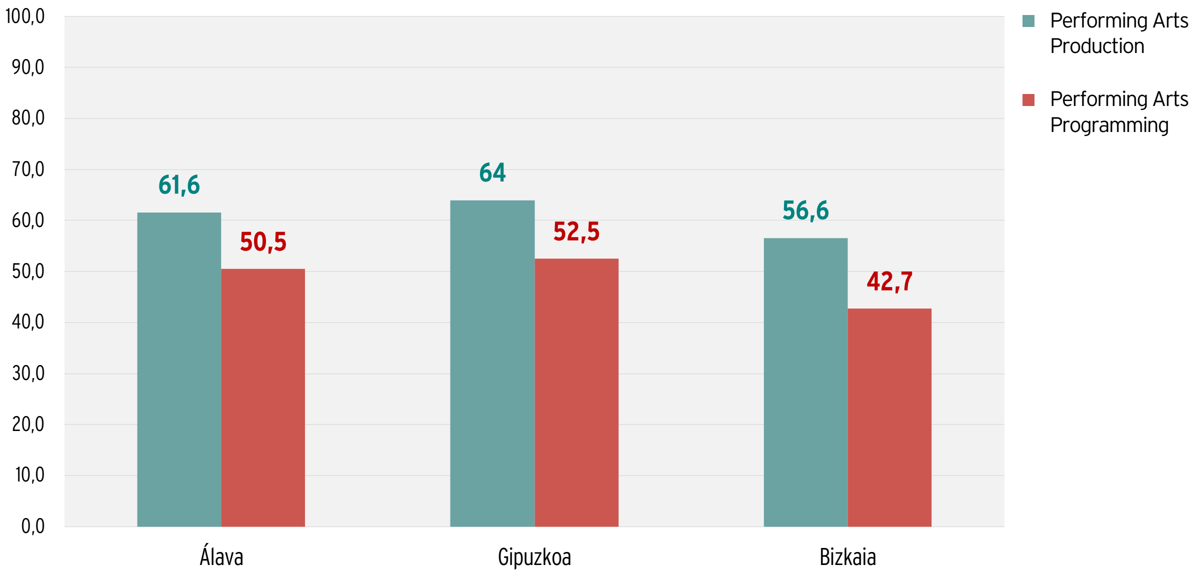
Theatre production in Basque by typology. Percentages. 2019



Finally, by manner of summary, if we analyse the data of the productions and programming of performing arts with regard to territory, it can be seen that it is more present in the creations than in the performing arts offer.

Figure 41.

The presence of Basque in the production and programming of performing arts by Historical Territory. Percentages. 2019



Basque in audiovisuals

In audiovisual production in Basque, those which are carried out in Basque and those with versions in both Basque and Spanish are counted.

In 2019, 39.8% of audiovisual productions were made in Basque, 10 points above the figure for 2017. If the calculation is made without accounting for EITB production, the percentage of production in Basque stands at 34.3%.

Production in this language accounts for nearly half of the production of companies located in Gipuzkoa (48.0%); of these, 30.6% are produced in Basque and 17.4% are productions with versions in both Basque and Spanish. In Álava, the global production data in Basque reaches 27.0%, with the predominance of those made in both languages. In Bizkaia, they account for 36.7% of production, which drops to 26.3% if EITB production is excluded.

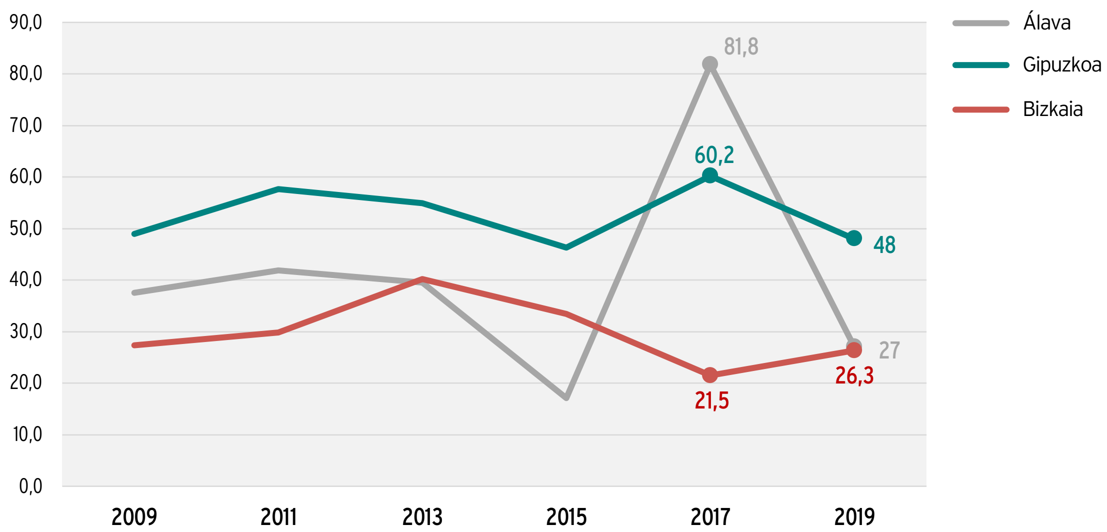
Figure 42.

Distribution of audiovisual productions in Basque and Basque and Spanish by Historic Territory. Percentages. 2019

Historical territory	Basque Language	Basque and Spanish	Total
Álava	2,7%	24,3%	27,0%
Gipuzkoa	30,6%	17,4%	48,0%
Bizkaia	23,6%	13,1%	36,7%
Total	25,2%	14,7%	39,8%

Figure 43.

Evolution of the relative weight of Basque in audiovisual production by Historical Territory. Percentages. 2009-2019



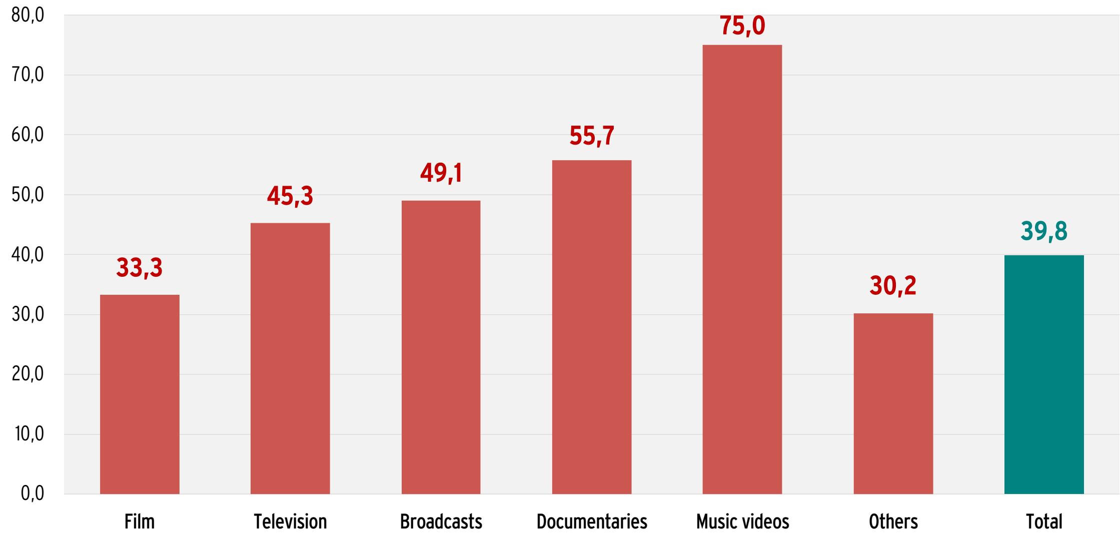
(1) Productions which are carried out in Basque and those with versions in both Basque and Spanish are counted.

(2) EITB production not included.

If the focus is placed on the typology of productions in Basque, music videos stand out, at a medium level are live broadcasts (49.1%), documentaries (55.7%) and television (45.3%). Film productions have a relative weight in Basque of 33.3%.

Figure 44.

Audiovisual production in Basque (1) by typology. Percentages. 2019. (with EITB)

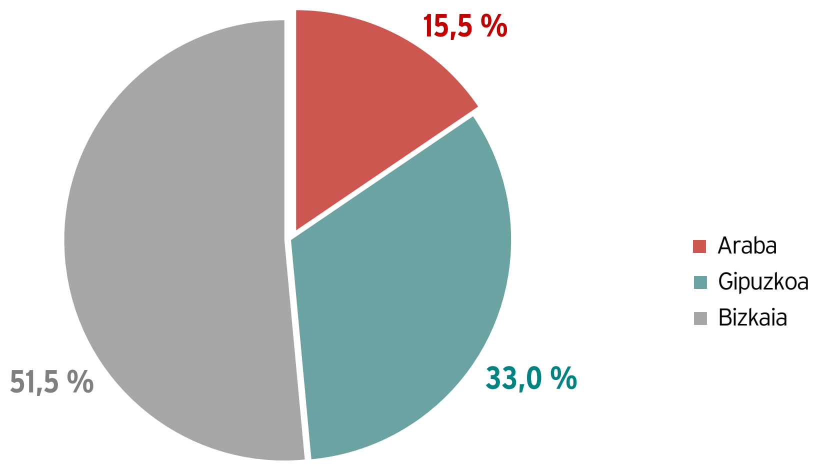


(1) Those productions which are carried out in Basque and those productions with versions in both Basque and Spanish are counted.

Regarding the possibility of enjoying films in Basque in cinemas, data indicates that 3.4% of screenings are in this language (4,967 screenings in 2019). Of these, 51.5% take place in Bizkaia, 33.0% in Gipuzkoa, and 15.5% in Álava. Observing these data according to the ownership of cinemas, it can be seen that it is private cinemas that hold most showings in Basque (70.5%).

Figure 45.

Cinema showings in Basque by Historic Territory. Percentages. 2019



Basque in publishing production

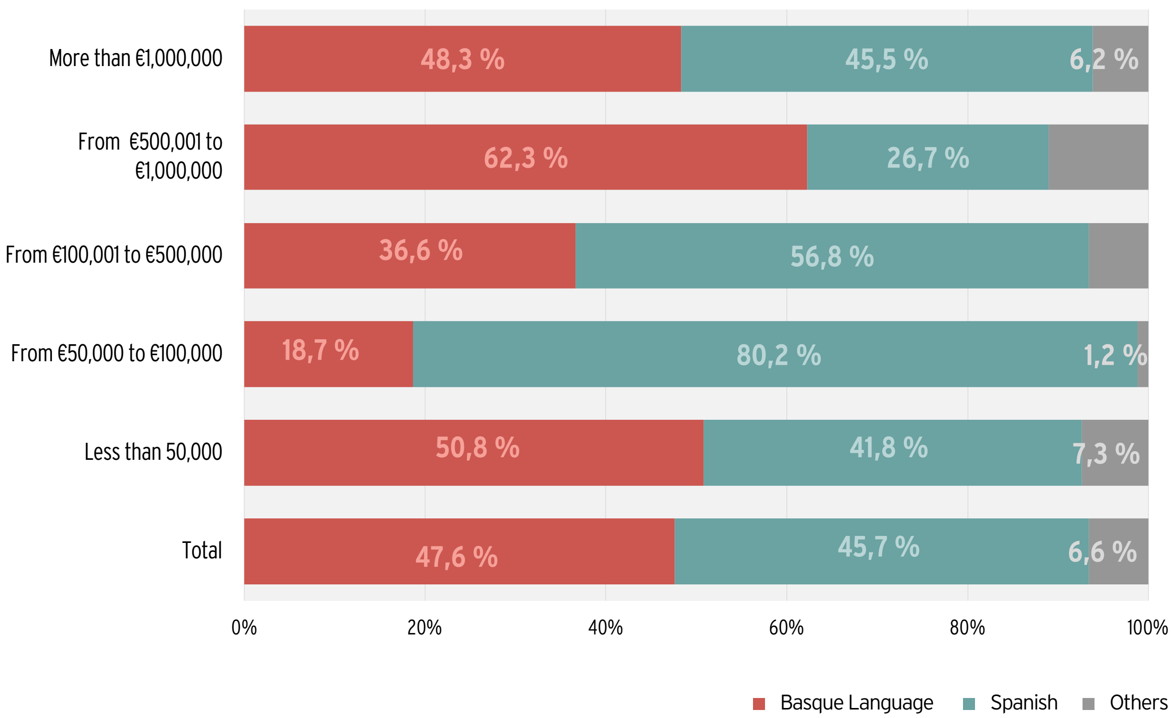
Publishing production in Basque has a weight of 47.6%[1] with regard to the total in 2019. If data is analysed according to the income profile of the agents, it can be seen that unlike 2017 when the companies with the highest income stood out, those that published the most in Basque, in 2019 the profiles with the majority of production in Basque are the ones between 500,001 and 1 million euros (62,3%) and smaller publishers (50.8%).

[1] One of the publishers in the sector presents extreme values, distorting all the data, and is therefore excluded.

Figure 46.

Relative weight of Basque in publishing production by publishers' profile.

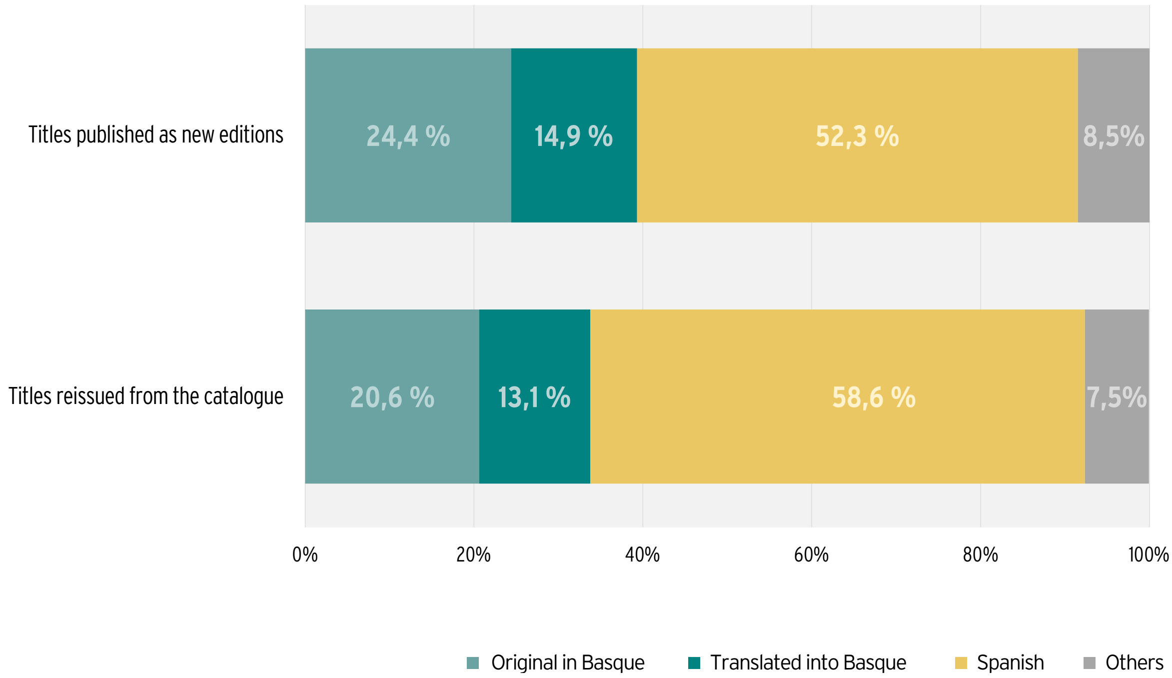
Percentages. 2019



The analysis of the original language of the works brings a new point of view to the characteristics of publishing production. Thus, of the 1,257 titles published as new in 2019, 24.4% are originally in Basque and 14.9% correspond to translations into this language. As for the 1,686 reissued titles in the catalogue, originals in Basque accounted for 20.6% and translations for 13.1%. In short, six out of ten titles published in Basque, whether they are new or reissues from the catalogue, correspond to works originally written in Basque.

Figure 47.

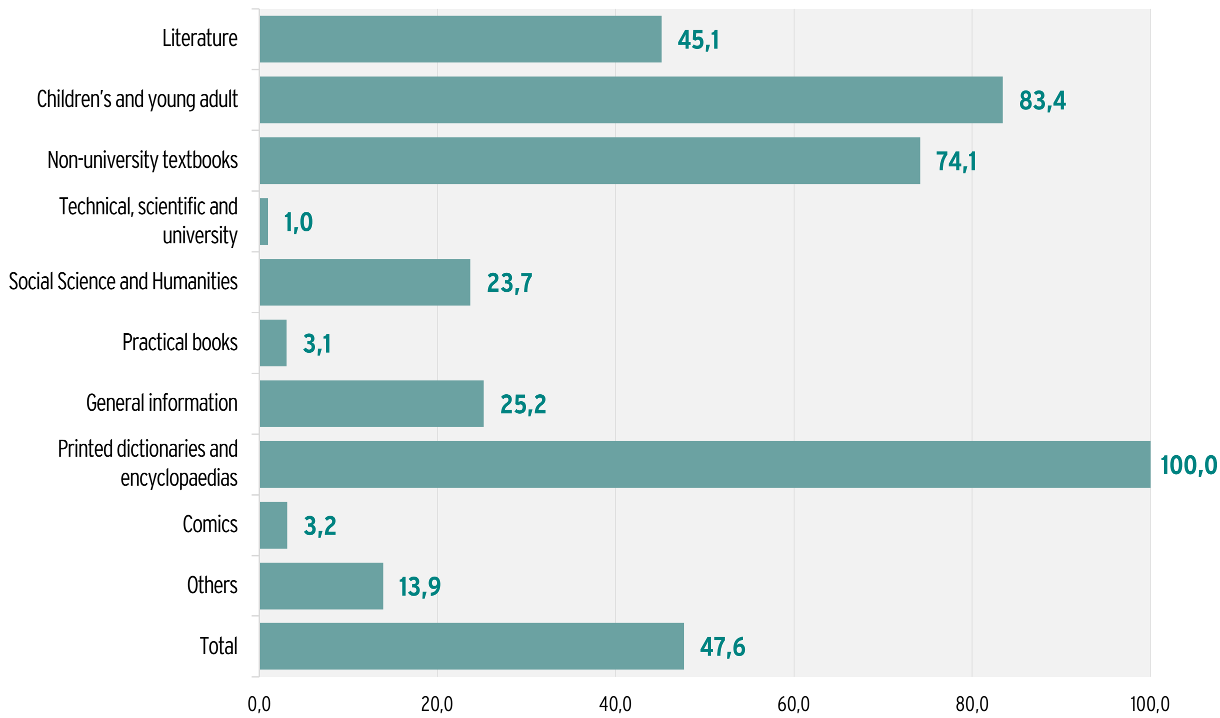
Publishing production by original language of the title. Percentages. 2019



More specifically, the data allows the highlighting of genres in which production in Basque is dominant, and the differences between new editions and reissues. In this regard, all the dictionaries and encyclopaedias are published in Basque. In the remaining genres, children's and young people's literature stand out, non-university textbooks and literature books are those that publish the highest volume of copies in Basque (83.4%, 74.1% and 45.1%, respectively).

Figure 48.

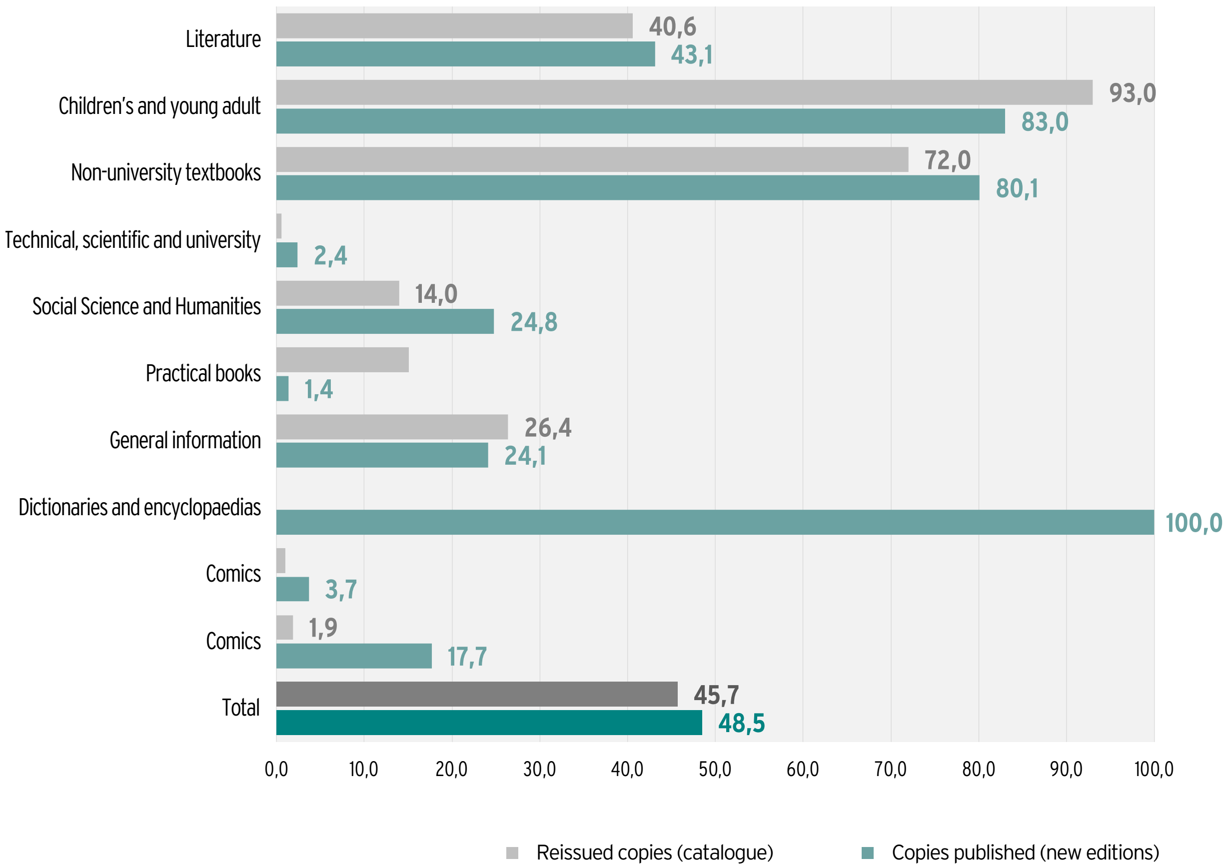
Publishing production in Basque by genre. Percentages. 2019



Publishing in Basque according to whether they are new editions or reissues from the publisher's catalogue presents differences: new editions slightly predominate (48.5%) compared to reissues (45.7%). Children's and young people's literature stands out, with 93% of reissues in Basque, compared to 83% of new editions and non-university textbooks also stand out for their production in Basque, 7 out of every 10 reissued books are in Basque and 8 out of every 10 are new editions. Finally, dictionaries and encyclopaedias, which do not present reissues, but all new editions are published in Basque.

Figure 49.

Publishing production in Basque by type of publishing (new material or catalogue) and typology of copies. Percentages. 2019



4. Dependency and weight of the public initiative

The public dependency of companies is calculated by checking the weight of their subsidies in their revenue. Thus, the level of public contributions to cultural companies in the CAE can be considered low: only 4.1% of its revenue comes from subsidies. This analysis includes only the subsidies received by private agents, not assessing what the public sector means in market terms, as a direct provider of services or as a contractor of the productions and services of the private sector.

The productive sectors in which the weight of dependency is greater were the performing arts (10.3%) and audiovisuals (6.6%). The companies, in addition to the subsidies, depend on a sub-contracting market where public programmers are dominant.

With regard to live music, promoters depend heavily on public sub-contracting, more than direct subsidies, which stand at 4.0%, a slightly higher percentage than the two previous editions; concert halls have a slightly greater dependency level, at 6.0%, a percentage which returns to the levels obtained in 2017.

Publishing and record production have a low level of dependency: publishers show a dependency of 5.1%, the same level as record companies.

Commerce hardly receives direct public contributions: neither bookstores nor record stores have them and in art galleries this public aid accounts for 2.0% of their income.

Finally, cinemas present a very low level of dependency as well. Out of their total revenue, only 0.2% are public contributions.

Figure 50.

Public dependency of private agents by sector and agent typology (1). Absolutes and percentages. 2015-2019

Sector	Agent typology	2015			2017			2019		
		Private agents	Total revenue	Public contri-butions	Private agents	Total revenue	Public contri-butions	Private agents	Total revenue	Public contri-butions
		Freq.	Thousand euro	%	Freq.	Thousand euro	%	Freq.	Thousand euro	%
Performing arts	Producer	57	10.593,40	16,1	69	15.989,20	9,7	82	17.438,63	10,3
	Programmer	2	-	-	2	-	-	2	-	-
Book	Publisher	39	31.145,60	4	34	27.234,10	3	34	27.562,76	5,1
	Bookshop	108	55.381,90	0	81	31.122,50	0	82	41.465,85	0,0
Music	Private promoter	11	26.385,30	2,9	11	47.079,70	3,5	13	42.250,76	4,0
	Concert hall	16	2.713,70	6,2	17	3.016,70	3,9	14	4.589,70	6,0
	Record company	3	644,6	6,6	6	2.066,10	8,3	5	437,15	5,1
	Record shops	20	2.982,40	0	17	2.799,00	2,6	10	2.153,52	0,0
Visual Arts	Art gallery	18	2.437,20	2,1	19	4.738,00	0,8	21	3.454,02	2,0
Audiovisual	Producer	89	47.218,90	7,9	69	42.727,70	8,2	73	57.143,98	6,6
	Cinemas				17	18.605,60	0,8	18	24.542,77	0,2
Total		363	179.895,00	4,3	342	195.579,30	4,2	354	221.039,14	4,1

(1) Typologies without private agents and/or in which statistical confidentiality could be breached are excluded.

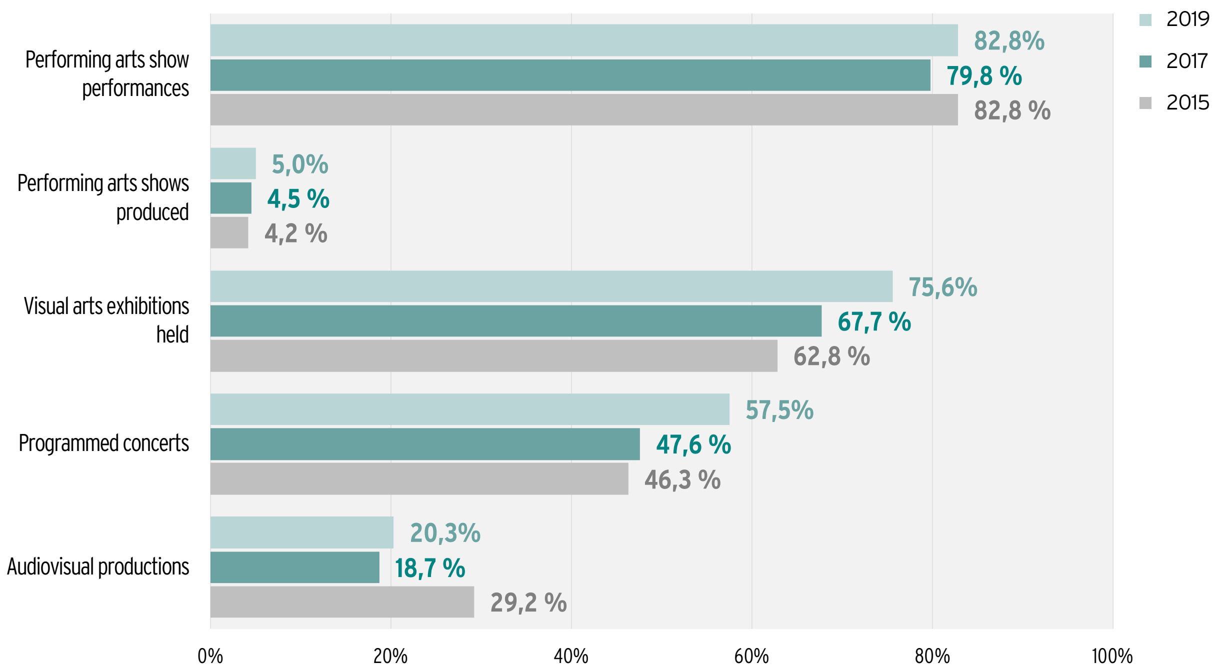
Activity

This look at the presence of public agents in the cultural offer gives another prospective[2]. The performing arts offer present in theatres and festivals is mostly public: eight out of ten performances correspond to this profile. In visual arts, 7 out of 10 exhibitions held have taken place in public exhibition spaces (75.6%). In the live music range on offer, 57.5% of concerts are public initiative driven. With regard to audiovisuals, it is worth bearing in mind that the great public weight in the activity is a given, as has already been noted in different sections of this report, due to the presence and weight of EITB.

Figure 51.

Relative weight of the activity carried out by publicly-owned agents.

Percentages. 2015-2019



[2] Publishers, bookshops, record shops and record companies are excluded from this analysis due to the lack of public agents.

5. Renewal and internationalisation

Imports

Data for cultural programming and production carried out in 2019 show us the domination of artists and creators of the Autonomous Community of the Basque Country, consolidating a dynamic present in previous editions. The commitment to self-creation is intensifying edition by edition.

If we observe musical programming data, we can see that six out of ten artists in programmed concerts are of Basque origin. Regarding outsiders, those from the rest of Spain (18.8%) slightly predominate compared to foreigners (16.6%). In record production, artists from the CAE represent 81.0%, and those from the rest of Spain (10.3%) exceed foreigners.

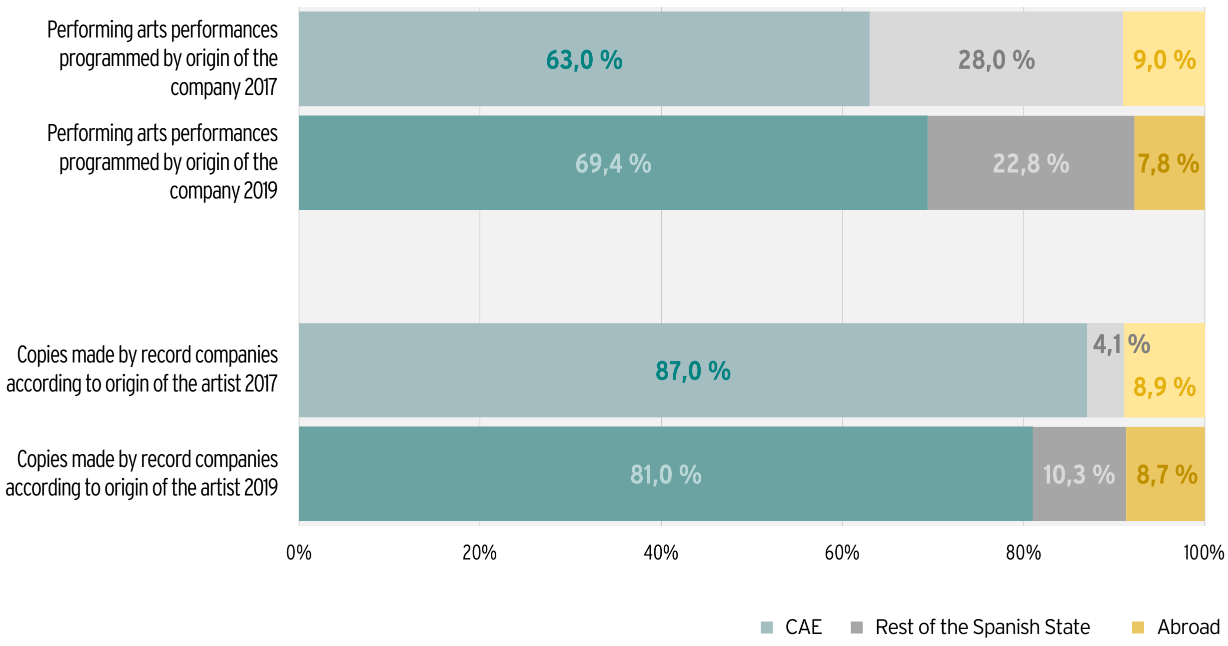
The hiring of foreign companies in the field of performing arts performances remained steady with a just slight fall (from 9.0% in 2017 to 7.8% in 2019). There was also a slight fall in groups from the rest of Spain, and the hiring of companies from the Autonomous Community of the Basque Country increased, reaching 69.4%.

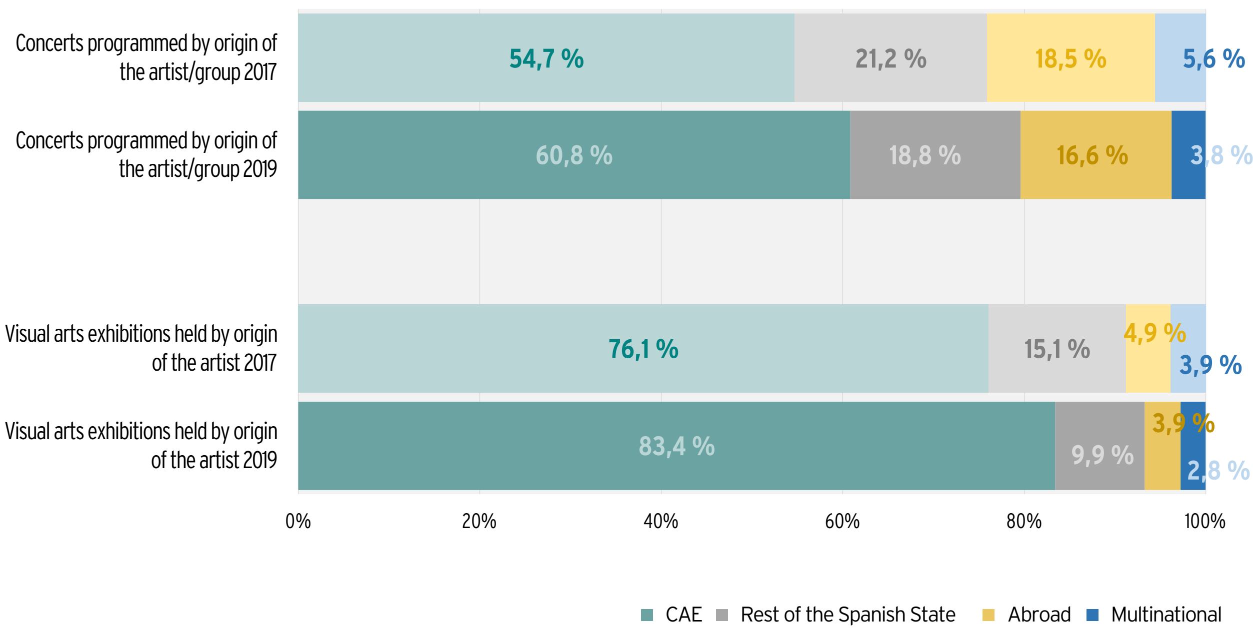
And finally, the visual arts sector followed the same trend as the rest of the sectors, where, edition after edition, the weight of artists from the CAE has increases (83.4% in 2019) and the weight of exhibitions held by foreign artists fell slightly (3.9%).

Figure 52.

Weight of internationalisation in cultural programming and production.

Percentages. 2017-2019



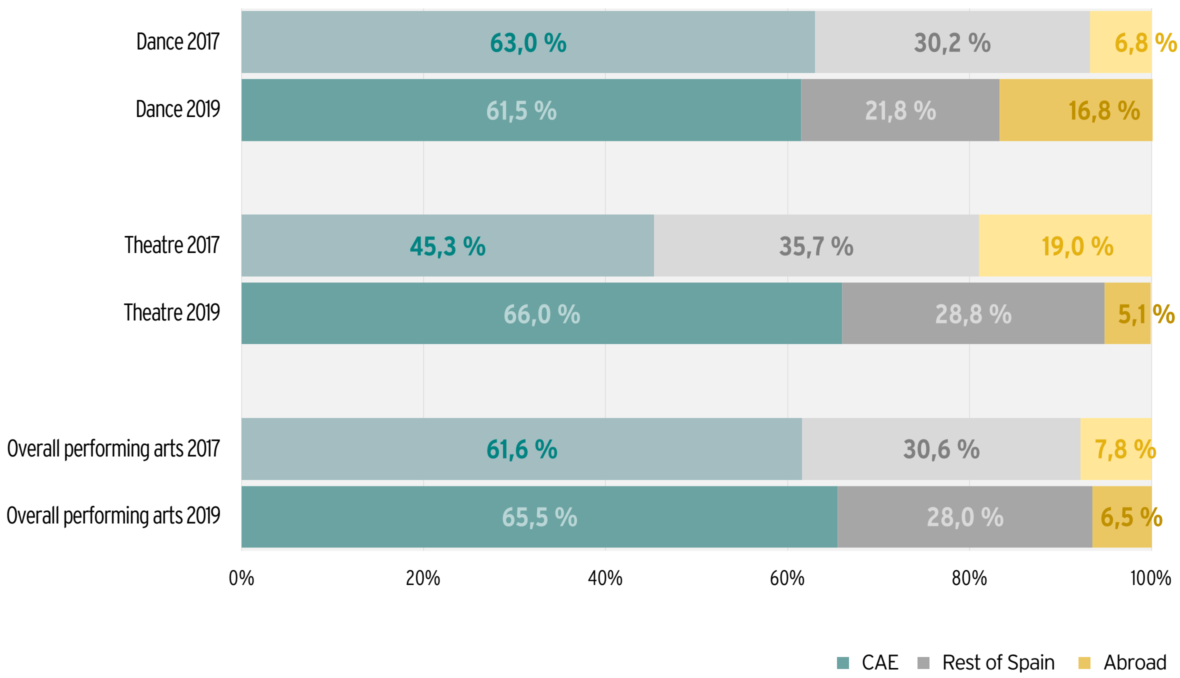


Presence in foreign markets

Exterior markets for the performing arts have a weight of 28%, if it is the rest of Spain, and 6.5% in foreign markets. Although it is secondary in the set of representations, theatre companies have a certain niche in the Spanish market (28.8%). In the case of dance performances, the weight of performances that take place abroad (16.8%) is significant.

Figure 53.

Performances made by performing arts production companies by place of performance. Percentages. 2017-2019



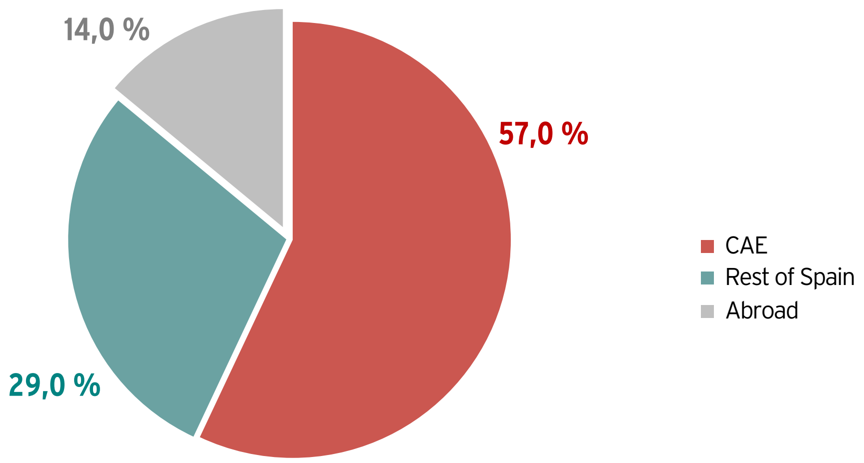
Maintaining the trend, foreign markets of publishers based in the Autonomous Community of the Basque Country represent 43% of the published output: 29% are destined for the rest of Spain and 14% go abroad[3].

3 One of the publishers in the sector presents extreme values, distorting all the data, and is therefore excluded.

Figure 54.

Publications (new and catalogue) published by publishers in Basque.

Percentage. 2019

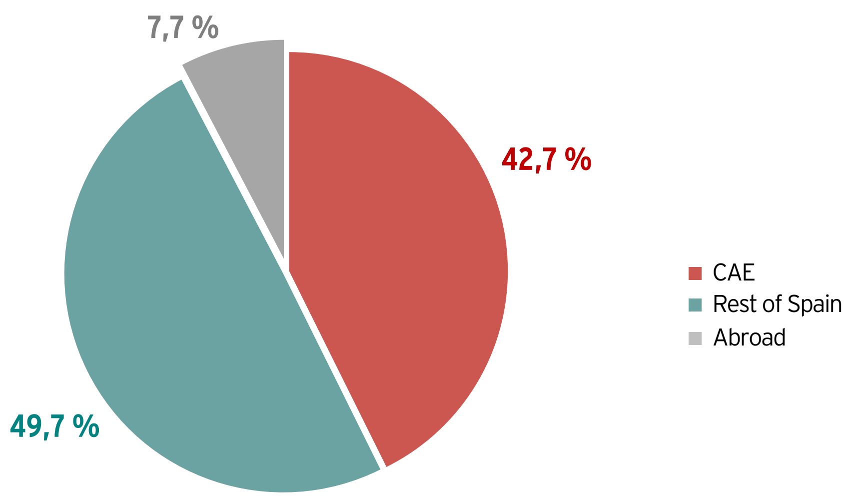


The dynamics of private concert promoters located in the CAE changed in 2019: they were distributed among the rest of Spain, where almost half of the concerts took place with 49.7% and the CAE market, with 42.7%. The foreign market, being smaller, consolidated the weight of the previous edition (7.1% in 2017; 7.7% in 2019).

Figure 55.

Concerts programmed by private promoters by place of promotion.

Percentage. 2019



Renewal

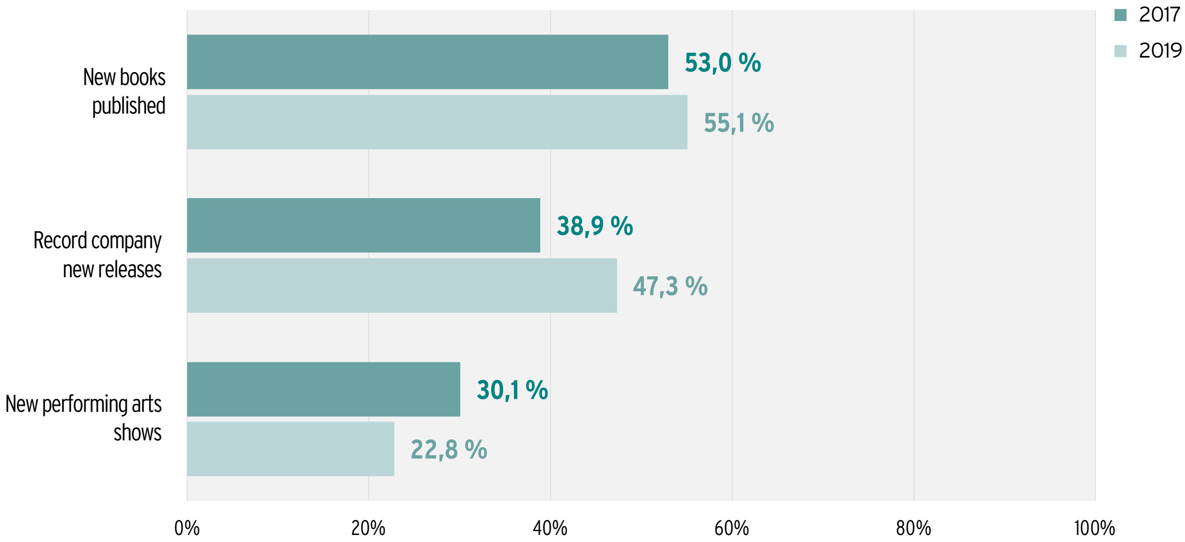
The renewal rate, conceived as the new productions in relation to the total, indicates an upward dynamic in the book and record industries, showing their productive vitality.

The publishing industry has a renewal rate of 55.1%. In the recording industry it decreases to 47.3%.

The rate also falls in the performing arts, to 22.8%.

Figure 56.

Renewal rate. Percentages. 2017-2019



6. Gender

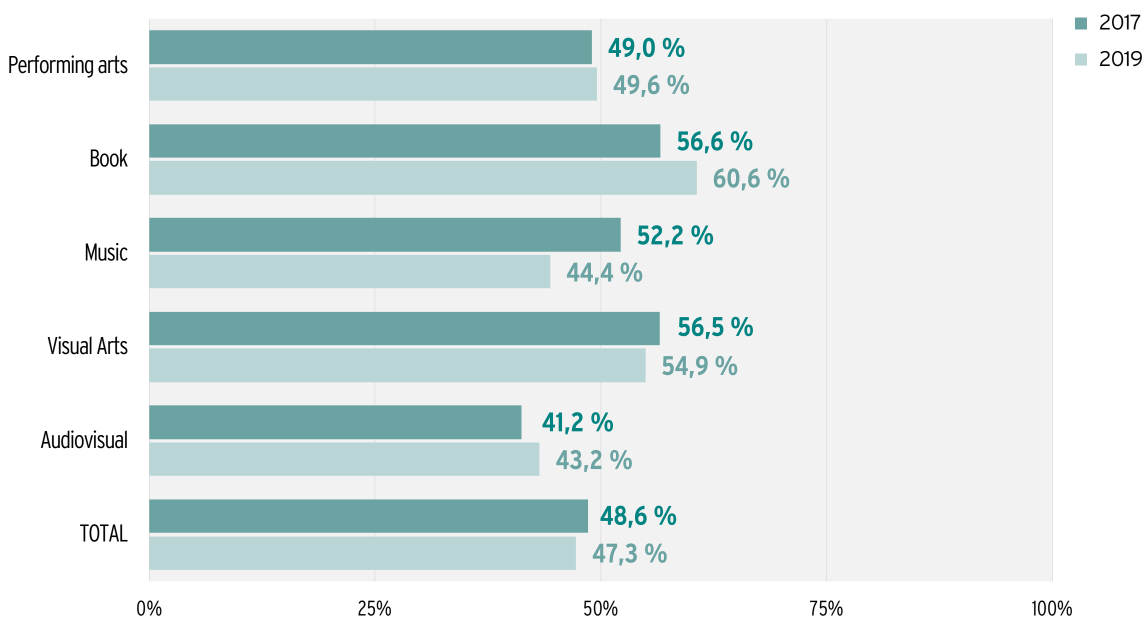
In 2019, the weight of women in the entirety of jobs in the arts and cultural industries was 47.3%. Books and the visual arts continue to be the sectors with the highest presence of women. In books, six out of ten working people are women; in the visual arts, they are more than half of the group (54.9%).

Compared to 2017, its weight in music decreased by 8 percentage points (from 52.2% in 2017 to 44.4%). In the audiovisual sector, it increased slightly (from 41.2% in 2017 to 43.2% in 2019), still with percentages around 40% of jobs. The best-balanced and stable sector is the performing arts, in which women make up 49.6%.

Figure 57.

Employed people equivalent to full time annualised by sex and sector.

Percentage of women. 2017-2019



By territories, although it is not a significant variable in the analysis by gender, Álava goes from 51.6% of working women to 45.1%, Bizkaia drops one point and Gipuzkoa increases 2 points compared to 2017. By ownership, the presence of women continues to dominate among associations and foundations (59.7%).

Figure 58.

Employed people equivalent to full time annualised by sex and Historic Territory.

Percentage of women. 2017-2019

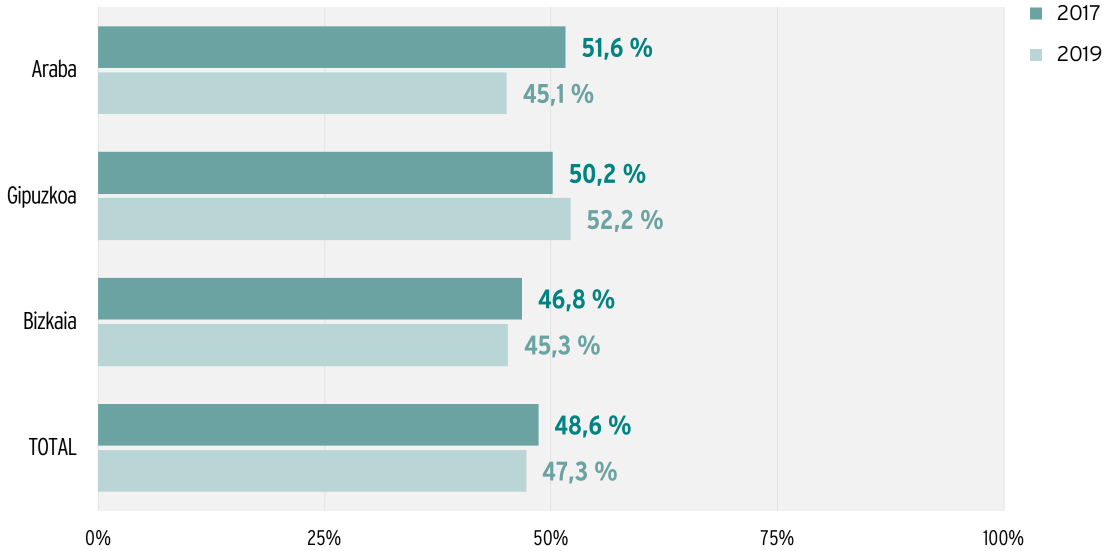
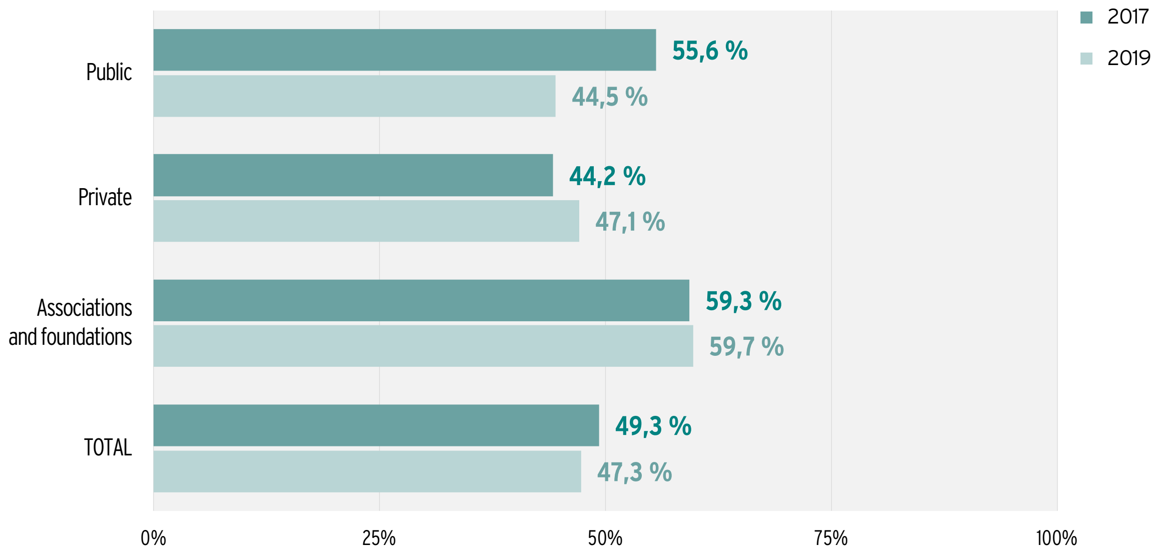


Figure 59.

Employed people equivalent to full time annualised by sex and agent ownership.

Percentage of women. 2017-2019



If we make a detailed analysis of the employment of women according to professional function, we can observe that in practically all sectors they dominate in the posts devoted to management and administration; except in concert halls and record companies, where they are barely present in this profile, in the rest of the sectors the presence of women exceeds 50.0%. One must be aware that this type of post makes up 14.1% of jobs as a whole (471 jobs).

As observed in the previous edition, technical profiles and directorship profiles are those occupied by a smaller proportion of women, 42.9% and 35%, respectively. It is worth highlighting the visual arts sector, whose exhibition spaces have directorship posts occupied by women in 65.2% of cases; and bookshops, where 54.8% are run by women. In the remaining sectors, the representation of women does not exceed 50,0%. In the case of technical profiles, six sectors have more than 60% presence of women: visual arts exhibitors (63.8%), bookstores (69.6%) and publishing houses (63.7%), record companies (62.0%), public music programmers (61.4%) and private promoters (60.8%).

Finally, other professional categories represent 54.2% of the total. In this case, record companies (100%), art galleries (84.2%) and bookstores stand out, where women have 81.3% presence. They also predominate among cinemas (69.0%), performing arts programmers (60.4%) and visual arts exhibitors (51.6%).

Figure 60.

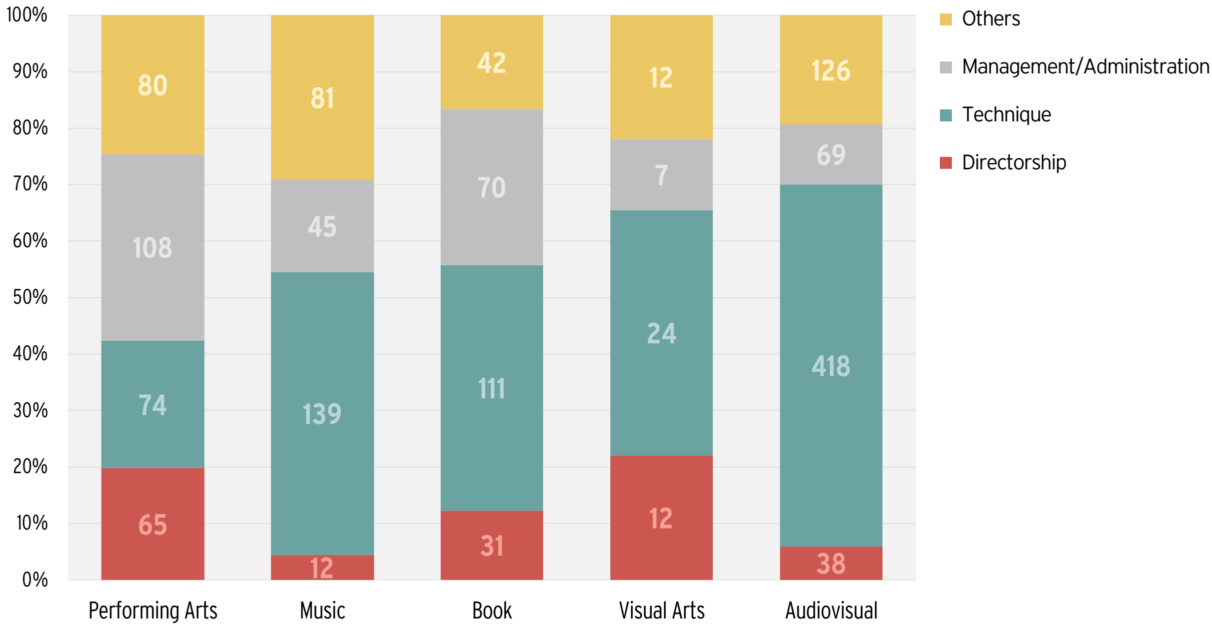
People employed equivalent to full-time annualised by professional category and agent typology. Percentage of women. 2019

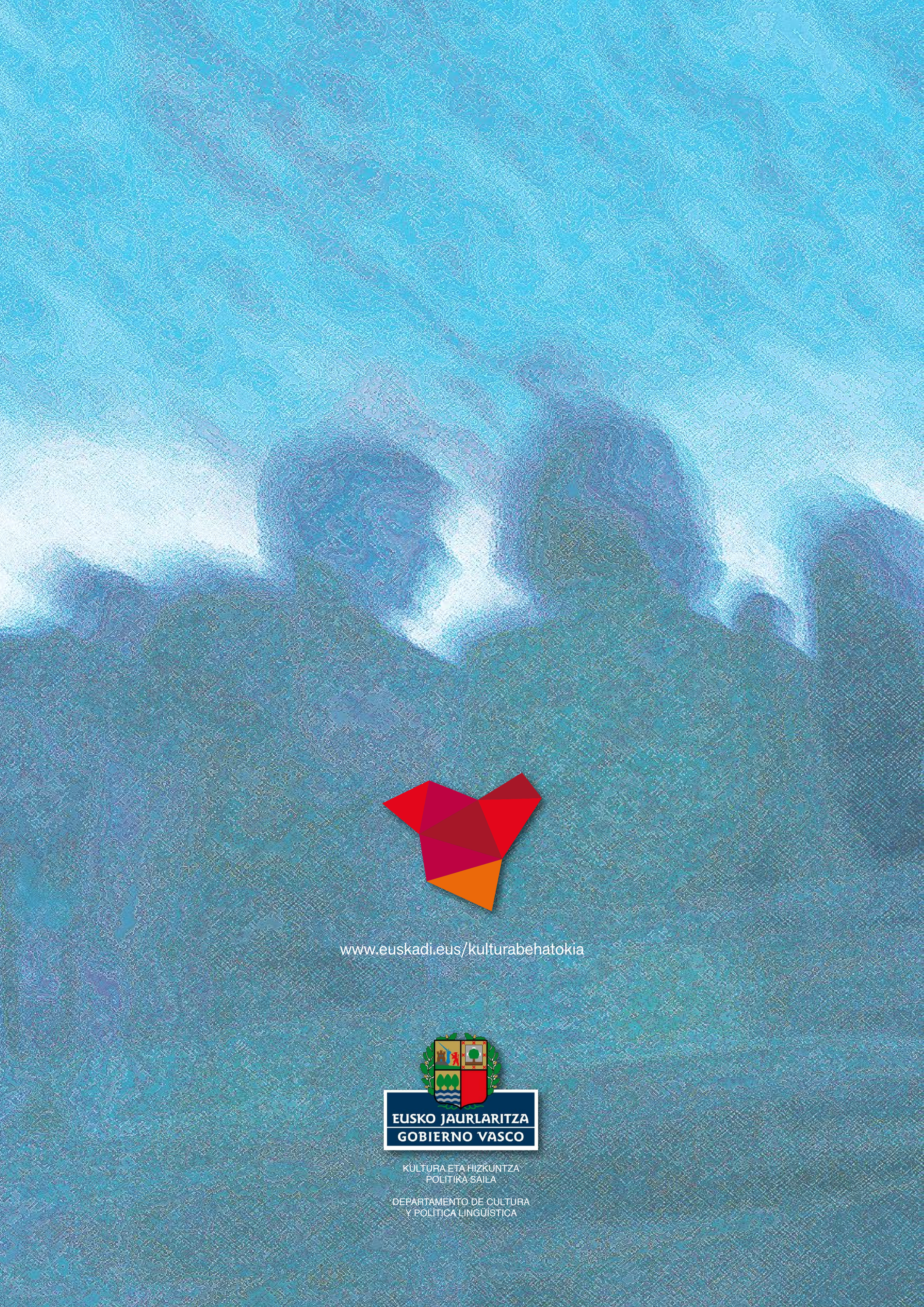
Sector	Agent typology	Directorship staff	Technical staff	Management/ administration	Others
Performing arts	Producer	44,3	43,3	62,1	43,0
	Programmer	47,6	35,6	72,4	60,4
Book	Publisher	34,5	63,7	52,3	41,7
	Bookshop	54,8	69,6	67,0	81,3
Music	Public programmer	26,3	61,4	66,2	62,4
	Private promoter	18,3	60,8	51,5	40,3
	Concert hall	1,6	0,8	1,9	11,0
	Music bands	20,9	21,8	50,0	0,0
	Record company	33,5	62,0	0,0	100,0
	Record shops	0,0	37,6	49,9	5,3
Visual Arts	Exhibitor	65,2	63,8	56,1	57,6
	Art gallery	35,0	26,5	78,6	84,2
Audiovisual	Producer	25,6	40,4	73,1	45,1
	Cinemas	32,0	42,5	64,9	69,0
Total		**35,0**	**42,9**	**63,4**	**54,2**

In absolute terms, it is the technical profiles that add the greatest number of jobs for women, with 766 workers in 2019. Audiovisuals stand out, with 418 women occupying technical positions, and music, with 139 jobs.

Figure 61.

Total distribution of working women equivalent to full-time annualised, by sectors and professional categories. Absolutes and percentage. 2019





www.euskadi.eus/kulturabehatokia

EUSKO JAURLARITZA
GOBIERNO VASCO

KULTURA ETA HIZKUNTZA
POLITIKA SAILA

DEPARTAMENTO DE CULTURA
Y POLÍTICA LINGÜÍSTICA