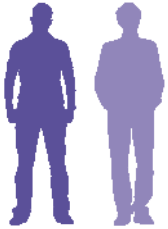




# WE

# ROTTERDAMMERS

# AND CULTURE

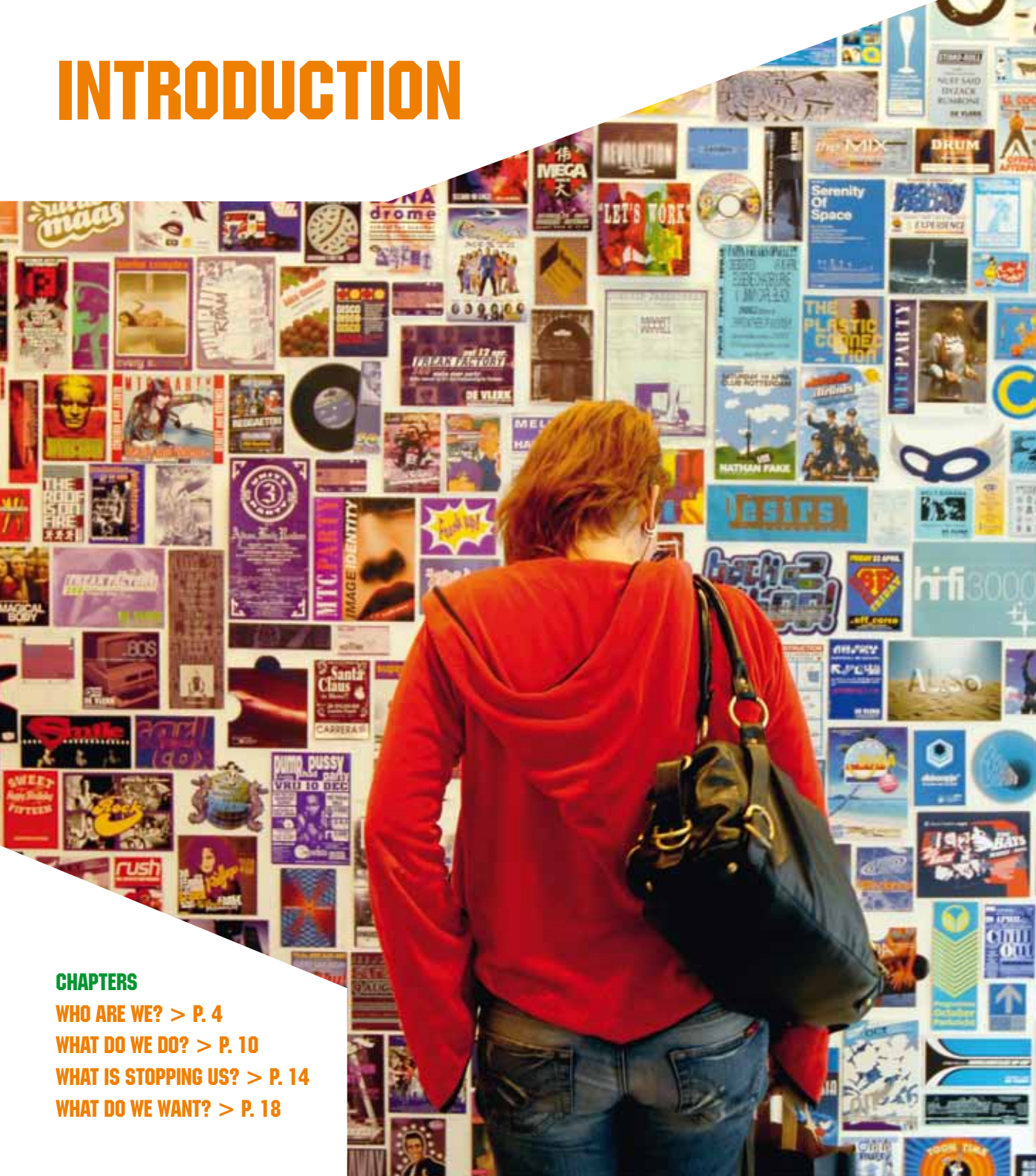


**AN ANALYSIS OF FIGURES AND TRENDS  
FROM FIVE YEARS OF AUDIENCE RESEARCH**



**rotterdam  
festivals!**

# INTRODUCTION



## CHAPTERS

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**Audience research has been very topical lately. One of the reasons for this is that the composition of the population has changed over the last few decades and will continue to change in the years to come. Another reason for the interest in audience research is the fact that cultural policy is increasingly linked to 'the interest and requirements of the audience'.**

In cooperation with the Rotterdam cultural sector, Rotterdam Festivals has been promoting a collective and structural approach for audience development in Rotterdam since the late 1990s. For more than ten years now, Rotterdam Festivals has initiated and coordinated research into the Rotterdam cultural audiences in a structured way. For example, by providing insight into the general composition, thresholds and motives of the culture audience.

We compiled the knowledge we have collected in this area in recent years in the Dutch publication *Wij Rotterdammers en cultuur* (We Rotterdammers and Culture) published in September 2011. Due to the positive feedback on the publication and the interest from our international contacts, we thought it useful to publish an English summary of *Wij Rotterdammers en cultuur*. Although the data in the studies are based on the Rotterdam area, the results and the approach can also be used by cultural professionals in other cultural metropolises.

First we introduce the target group model used by Rotterdam Festivals, then we describe the eight main audiences we distinguish (Who are we?). In Chapter 2 (What do we do?) we show what people do in their free time and determine how the cultural audience of Rotterdam differs from the rest of the Netherlands and Europe. Then we discuss the barriers people experience with regard to cultural events (What is stopping us?). Finally, we summarise what the requirements of each of the eight target audiences are (What do we want?).

We hope that you will enjoy reading this English edition. And that it may contribute to increasing your knowledge about your audience so that even more people will benefit from what the arts and culture sector has to offer.

# 1 WHO ARE WE?

## EVERY INHABITANT OF A CITY IS PART OF ITS POTENTIAL CULTURAL AUDIENCE. WHAT IS THE COMPOSITION OF THIS AUDIENCE AND WHICH TARGET GROUPS CAN WE DISTINGUISH?

### Rotterdamers...

#### ... are young

Compared to the rest of the Netherlands, Rotterdamers are young. For many years, the proportion of young people between 13 and 25 years in Rotterdam has fluctuated between 17 and 18 percent, compared with 16 percent nationwide. Future expectations reinforce this image: in Rotterdam we see a growth in the number of young people and a decline in the number of the very elderly. This is contrary to the national trend, where the population is ageing.

#### ... are multicultural

While in the Netherlands as a whole 2 in 10 people are of immigrant origin, in Rotterdam the figure is nearly 5 in 10. Amongst Rotterdam youths aged between 13 and 25 years, almost 6 in 10 are of immigrant origin. The expectation is that Rotterdam will remain multicultural and become increasingly multicultural.

#### ... have lower incomes and less education

Compared with the Netherlands and other big cities in the Netherlands, Rotterdam has a high percentage of households with a low income. In addition, Rotterdamers have less education. The difference with Amsterdam and Utrecht is particularly marked.

### The (potential) cultural audience of Rotterdam

Everyone is potentially part of the cultural audience, but obviously not everyone has the same cultural behaviour. The characteristics by which people differ – i.e. age, ethnicity, education, income – influence their cultural participation. To be able to say something about cultural behaviour we have divided the cultural audience into groups.

### Three main groups

Different models from the UK, Belgium and the Netherlands have one thing in common: they divide the cultural audience into three main groups:

- Culture as a natural part of life (heavy users) – the typical visitor to cultural events: older generation, better educated, higher income level and/or of Dutch descent.
- Culture as an option (medium users) – occasional visitors to arts and cultural events. For these people, culture is a serious leisure option but much passes them by or they make other choices.
- Culture by accident (light users) – this group visits cultural events by chance and is far removed from the cultural events that are on offer. They do not know what's on offer and think it's not suitable for them. They only come in contact with culture by chance, such as at a free festival.

### The Rotterdam model

Rotterdam Festivals uses the MOSAIC target group segmentation system. MOSAIC divides Dutch consumers into groups based on their shared socio-demographic and socio-economic characteristics, behavioural data and neighbourhood characteristics. These groups differ from each other in stage of life, socio-demographic data and cultural orientation. The Rotterdam target groups are now widely used in the marketing activities of the cultural sector. Below we give a classification of the eight target groups by cultural orientation and stage of life and a summary of the characteristics of these groups.

### The Rotterdam Targetgroup model

Cultural orientation	Stage of life			
	18	25	35	60 years
Culture as a natural part of life/ heavy users		Starting Urbanites	The Well-Off	Senior Culture Vultures
Culture as an option/ medium users	Student Types	Sporting Families		Simple Retirement Lovers
Culture by chance/ light users		Survivors	Modal Midlifers	



### So?

It is important to know the composition of your potential audience and how this will change. What is the situation in your country or city?



# 1 WHO ARE WE?

## The Rotterdam target groups: Who are we?

### 1. Starting Urbanites



*“I don’t really plan anything. My friends and I often decide at short notice what we want to do. Posters in the city, e-newsletters and messages on social media sites are very handy to keep us informed.”*

*Manuela Kamps*

Starting Urbanites are aged between 25 and 35 and attach importance to a comfortable life, freedom of choice, excitement and fun. They live alone – and may or may not be actively looking for a partner – or live together as a couple. The accumulation of material wealth is a specific goal for the near future. Plans to start a family are for the future as they are not yet settled in life. They are highly educated and are mainly of Dutch descent. Their main barriers to visit performances (besides price) are that they have no time or are not sure what to expect.

### 2. The Well-Off



*“Planning is important for me and when all the brochures arrive in the post, my wife and I and our friends have a lot of fun planning pretty much the entire cultural season.”* Karel Sandbergen

The Well-Off are of different ages but mainly aged between 36 and 60. They are ambitious, capable, astute, independent and open-minded. They tend to live in a family and their children may or may not still live at home. More than half of them are highly educated. Money is not an issue for them, and they like to spend it on arts and culture. They have an above-average interest in visiting theatres, concerts and museums. Of all the target groups, the Well-Off experience the fewest barriers. For them, the biggest barrier is lack of time.

### 3. Senior Culture Vultures



*“Ideally I buy tickets from a real person behind the counter, but if all else fails I also buy tickets via the Internet.”* Margot van Oorschot

Senior Culture Vultures are hedonists who are predominantly aged over 60 and have a broad range of interests in which general education plays a central role. They live as a couple in their own home and their children have mostly left home, or they live alone. They are generally highly educated, often have a busy working life in which they hold senior positions in business or are now enjoying their retirement. Despite their age and stage of life, a significant portion of this group is still closely involved in society. They want to continue to develop themselves and of all the target groups, they go to performances the most. The main barrier to visiting a show is that they do not feel safe on the streets at night.

### 4. Student Types



*“Last minute tickets for students appeal to me, because I never plan far ahead anyway.”* Jamila Alaoui

Student Types are ambitious, free and open-minded, creative and they attach importance to equality and respect. Most of them are between 18 and 25 years. The majority live alone and often in rented accommodation. They spend a large proportion of their money on going out. An enjoyable evening with friends is more important than attending a cultural event. They visit the cinema or film house most often, followed by cultural festivals and cabaret performances. Barriers to go to performances are mainly that they do not have the time or do not know what’s on offer. For this target group the decision to visit a performance is often a social process often taken on the day itself. Student Types prefer to plan as shortly as possible before the event.

# 1 WHO ARE WE?



## So?

A population's composition greatly influences cultural participation in a city. A target group model offers many useful insights into the cultural behaviour of people. What do the different target groups in your city or country look like?

### 5. Sporting Families



*“Performance venues and museums could be more responsive to families with children, I think. If they have to keep still and be quiet the whole time I would rather not take my children to a theatre or a museum.”*

*Sander Gabor*

Sporting Families are between 25 and 35 years. Their level of education is variable; some have completed college or university, others have only completed secondary vocational education. Family life is important for this target group. More than average they indicate that cultural visits are expensive and not interesting to them. The main barrier to visiting performances is lack of time. Other barriers they experience are price, family life (time and social aspect: they want to do everything as a family), they don't want to visit cultural events too often (it must remain something special), and unfamiliarity with the offer.

### 6. Simple Retirement Lovers



*“We no longer go into the city at night, but if the Rotterdam Philharmonic Orchestra were to host a good local programme here we would certainly go.”*

*Herman van der Linden*

Simple Retirement Lovers are over the age of 60, contented, helpful, conscientious and attach importance to security. They live together as a couple or live alone and are often less educated. They still like to socialise and occasionally go on a trip, but are no longer interested in leading a varied and exciting life. For them the biggest barriers to visit cultural events are that they do not feel safe on the streets at night and that they have no one to go with. They are not very focused on cultural visits and do not undertake many cultural activities. They make a clear distinction between high and low culture; they do not consider all the activities they undertake as culture. This target group has a substantial need for recognition and personal contact.

### 7. Survivors



*“I'm not sure where to get information about what's on offer. When I look through the free local newspapers, I look for ads and special offers.”* Aydin Çelik

Survivors often have limited funds. They attach importance to peace, harmony and equality. Many of them are between 25 and 35 years of age and most are a couple with one or more children living at home. They often have low to middle education levels and form a multicultural target group. They look for a sense of security in their community or with friends, with whom they share important values and standards. They are not very likely to spend their limited funds on cultural entertainment. More than average, survivors mention not knowing what is on offer as a barrier to visiting cultural events; they also often mention not having someone to go with as a barrier.

### 8. Modal Midlifers



*“They could actually put on quite a bit more for ‘people like us’. Just nice, friendly shows or musical performances for a reasonable price.”* Carla de Visser

Modal Midlifers are contented people between 40 and 60 years. They especially want a good, comfortable life and do not attach much importance to their independence. They are mainly couples with older children still living at home, or the children have left home. The term 'modal' refers to their centre position in the areas of education and expendable income. Culturally, they have no striking profile; they are not really engaged with the world around them and prefer to focus on their family, work and neighbourhood. For them the main barrier to culture is that they do not feel safe on the streets at night.

# 2 WHAT DO WE DO?

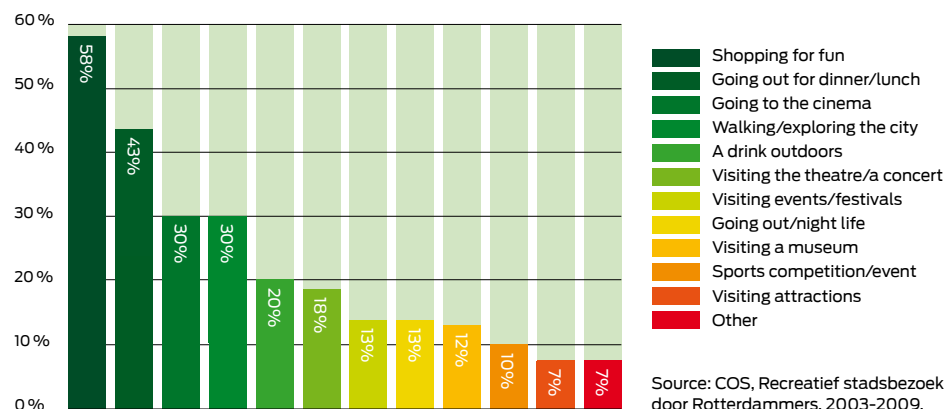
## HOW DO THE TARGET GROUPS SPEND THEIR LEISURE TIME? WHO GOES TO WHAT EVENTS AND WHO AVOIDS CERTAIN EVENTS? IS THIS DIFFERENT FROM THE AVERAGE DUTCH CITIZEN OR RESIDENTS OF OTHER CITIES?

In the past decade, the available free time has remained constant, both nationally and in Rotterdam. People experience this differently, however: almost half of the Rotterdammers believe that the amount of free time they have has decreased during the last five years. This perception may be explained by an increase in the offer of leisure activities and the trend that people want to get everything out of life. Generally speaking, the older the person the more free time they have and the younger they are, the less free time.

### Wat do Rotterdammers do in their free time?

In addition to participating in culture, free time is also used for many other leisure activities such as the use of media, visiting attractions, shopping, dining out, participating in sports, volunteering and social contacts. In particular, the use of media and maintaining social contacts takes up a lot of free time. Rotterdammers were asked about the most important leisure activities they normally undertake in Rotterdam. The activities most frequently mentioned are 'shopping for fun' and 'going out for dinner/lunch'. 'Cultural visit' appears relatively often in the list.

Leisure activities Rotterdammers generally undertake in Rotterdam (%) 2009

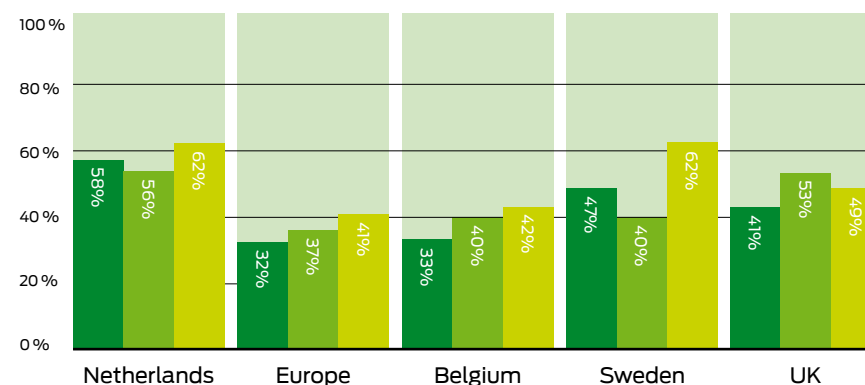


One of the ways in which the eight Rotterdam target groups distinguish themselves are the cultural activities they undertake in their free time. Thus, the 'heavy users' are often found at performances and museums; only Theater Zuidplein and the Community Art Centres occasionally attract 'medium' and 'light users'. Only the festivals reach all the Rotterdam target groups.

### The Netherlands and Europe

Cultural participation in the Netherlands is well above the European average. Generally speaking, the more northern the country in Europe is, the more often the inhabitants visit theatres, concerts or museums. The Netherlands also has a considerably higher cultural participation compared to neighbouring countries such as Belgium, Germany, France and the UK.

The Netherlands in comparison with Europe



Source: SCP, Cultuurbewonderaars & cultuurbeoefenaars 2009

- Going to the theatre
- Going to a concert
- Visiting a museum or gallery



### So?

Cultural participation in the Netherlands is high. Especially performances and museums can still win audiences by also enticing 'medium users' or even – e.g. in association with a festival – 'light users'. Knowledge of the barriers to cultural participation is essential – see Chapter III.

## 2 WHAT DO WE DO?

### What arts and culture activities do people actively participate in themselves?

In Rotterdam, almost half the population participated in the arts in 2009. This is approximately equal to the percentage for the Netherlands as a whole. Amongst young people (between 13 and 25 years), the percentage of participation in arts even exceeds 60 percent. Up to 45 years of age, we see a slow decline in the percentage of people who actively participate in the arts, which then rises again (people have more time after a certain age). Furthermore, the higher the education level, the higher the active participation in arts.

### From passive to active

Studies were carried out in Rotterdam into the correlation between active and passive cultural participation. It appeared that Rotterdammers who sometimes go to shows or museums were often more artistically active than those who do not. The reverse is also true: Rotterdammers who are artistically active go to a show or museum more often than non-active Rotterdammers.

### What determines cultural preferences?

In the many studies carried out into cultural participation the main recurring variables are education level, ethnicity, stage of life/age and experience. The groups that see culture as a natural part of life, for example, are generally better educated, of Dutch descent, older and were usually brought up to enjoy cultural events. The variables of education level, ethnicity and age have already been discussed. Here we deal primarily with the variable 'previous experience'.

### Previous experience

Cultural participation is partly determined by the culture you inherited from home, school and your immediate surroundings. A person's cultural preferences are largely formed during childhood. Today's senior citizens grew up in a time when art was mainly seen as something that was civilized, was synonymous with beauty and had a positive formative value. 'High' culture, as traditional culture (opera, ballet, museums, classical music) was long called, clearly stood apart from 'lower' entertainment (such as pop music and comedies). In later generations, the popular culture on offer played an increasingly

bigger role. The baby boomers, who grew up in the 1960s, were familiar with pop culture (musical, pop, cabaret, film) from childhood. This phenomenon led to the advent of what the American researcher Richard Peterson calls 'the cultural omnivore', described by Herman Franke (author and columnist with the NRC Handelsblad) as "a well-educated forty-pluser who listens to Mozart and pop music, goes to the opera but occasionally enjoys a musical as well and can put away Homer to watch a kick-ass film on TV." People in this group move freely between the traditional 'high' culture and 'low' culture, depending on what they feel like doing.

This development continues with the younger generations. Young people today are more in touch with popular culture than traditional forms of art. New art forms are also developing which are less easy to classify, and these in turn influence traditional art forms – for instance a combination of hip hop and ballet, or the use of video art in opera and theatre performances. Thus the distinction between traditional and popular art forms is becoming more blurred.



### So?

Cultural institutions should be aware of the changing attitudes to traditional art forms, and the changes within the art forms themselves. These changes have a major impact on the size and composition of their audiences, now and in the future.

# 3 WHAT IS STOPPING US?

## Barriers to culture participation

According to many studies, ethnicity and education are determining factors for cultural participation. If you have grown up with certain forms of culture, the more likely you are to participate in these forms of culture later on in life. Unknown means unloved. People experience a number of barriers that deter them from cultural participation:

- Social barriers; the atmosphere and entourage scare them off, the form of culture is alien to their social environment, nobody in their environment goes to this type of event – “It’s not for me”;
- Competence barriers; lack of necessary knowledge – “I don’t know anything about that”;
- Practical barriers; admission prices, time involved, geographical distance and lack of information about admission prices, time and venue.

Interestingly, social and competence barriers form a much bigger barrier to new audiences than practical barriers. The removal of practical barriers is particularly effective with pre-existing audiences. This also applies to the audiences of the various forms of culture – someone who only visits museums is a new audience for the performing arts and is more easily enticed to attend performances through the removal of social and/or competence barriers than the removal of practical barriers.

## Barriers in Rotterdam

Rotterdammers were asked about their barriers to cultural participation. They were presented with the statement “I would like to attend a cultural event but ...”

Degree of agreement with the statement “I would like to attend cultural events, concerts or museums, or do so more often, but ...” in % of Rotterdammers in 2007

	I have no time for it	I do not feel safe on the streets at night	I often don't know what to expect, if it is worthwhile for me	I'm not sure what's on offer	I don't have anyone to go with
agree	37	28	26	25	14
neutral	29	25	30	31	26
disagree	34	47	43	43	59
total	100	100	100	100	100

Source: COS, Cultuurparticipatie van Rotterdammers, 2007.

In particular, Rotterdammers aged 25-44 and older youth (18-26 years) indicate that they have no time for cultural visits. For Rotterdammers between 65 and 75 years, women, and youth (13-17 years), a feeling of insecurity was the biggest barrier. Young Rotterdammers (13-25 years) and non-western Rotterdammers experienced lack of information as a barrier more frequently.

## Distance / travel time as a barrier

To what extent is travel time or physical distance to a cultural event a barrier, or vice versa: to what extent is proximity to a cultural institution an incentive to visit it? Research has shown that travel time in particular affects the frequency of cultural visits. The shorter the travel time, the more often people visit a cultural institution. This effect is less for large-scale events like a rock concert in a stadium.

## Other barriers

In another study, Rotterdammers were asked what could be improved in Rotterdam’s cultural offer: “Here are some measures that may make it more attractive for you to participate. Which of these measures would persuade you to attend a cultural event in Rotterdam more often?” In answer to this question, 47% of respondents said they would welcome discounts or a lower admission price. The highest income groups also mentioned this measure the most.

Of the respondents, 35% indicated that better information would be useful and a quarter indicated the need for specific programme information to better determine whether the event was worth visiting. Especially young people (15-30) experienced lack of information as a barrier.

## Barriers experienced by ‘medium users’ (culture as an option)

In order to entice more Rotterdammers to participate in culture, it’s useful to know what specific barriers exist for the target groups in the category ‘Culture as an option’. Although these groups are quite interested in the cultural offer, lack of time and the many alternative leisure activities available to them mean that they don’t always opt for a cultural visit. The barriers experienced by these groups when visiting the theatre or a museum were examined in a qualitative survey.



### 3 WHAT IS STOPPING US?

#### Student Types and attending performances

The two main factors that influence the perception of going to a performance for Student Types are content (show or performance) and atmosphere (whom you are with, other audience, general mood). Of these two, content (programming) was the determining factor in opting to go to a particular performance. Additional benefits offered by the venues are also appreciated, such as a nice reception, good sound and free wardrobe. The audience is also important for this target group. Too many older people in the venue makes this target group feel uncomfortable. Other barriers experienced by Student Types are admission price, lack of time, no one to go with, or that the performance/show is not on in Rotterdam. This target group therefore experiences mainly practical and social barriers to go to the theatre.

#### Sporting Families and attending performances

For Sporting Families, the stage of life is very much determined by their children. When children go along to a performance, it is important that the show appeals to them and that the sitting comfort and starting time/duration of the show is family friendly. Barriers this target group experiences are the admission price and family life (time and social aspect: they want to do everything as a family). This target group also clearly indicates not to want to attend too many cultural events with children, as it should remain something special. The children must experience it as a treat. Finally, this group also mentions unfamiliarity with the offer as a barrier, especially when visiting performances with the children. For this target group, therefore, the barriers are largely practical.

#### Simple Retirement Lovers and visiting museums

When Simple Retirement Lovers visit a museum, it is important to them that the exhibition or collection has a recognisable subject or theme. In addition, they indicate that they enjoy contact with the people who work in the museum. For that reason they often visit smaller museums run by volunteers who have time to talk about the museum and are knowledgeable about the exhibition or collection. Unfamiliarity with the offer is often mentioned as a barrier to a museum visit by this target group; the publicity does not always reach the target group. Moreover, they often feel that visiting bigger museums is 'not for them'. Smaller museums are better suited to them. Finally, price is also a barrier, so for them, free access is clearly an enticing factor. This target group experiences all three types of barriers: social, competence and practical barriers.



#### So?

It appears that practical barriers in particular (such as admission prices and the lack of information) define the cultural participation of these target groups, followed by social and competence barriers. Removing practical barriers and social barriers (such as atmosphere and entourage) offers opportunities to reach target groups interested in culture.

# 4 WHAT DO WE WANT?



**THIS SCHEDULE SHOWS THE REQUIREMENTS OF EACH OF THE EIGHT DIFFERENT TARGET GROUPS FOR CULTURAL PARTICIPATION AND THROUGH WHICH MEDIA THE INFORMATION ABOUT CULTURAL ACTIVITIES CAN BE PRESENTED TO THEM.**

	Aimed at / requirements	Media used
Starting Urbanites	<ul style="list-style-type: none"> <li>• Small-scale activities</li> <li>• Inspiration / exaltation</li> <li>• Personal development</li> </ul>	<ul style="list-style-type: none"> <li>• Social media (Facebook, Hyves, LinkedIn)</li> <li>• Friends and family</li> <li>• Free local newspapers</li> <li>• Posters</li> <li>• Metro / Spits (free daily newspapers)</li> <li>• Uitagenda (monthly cultural calendar)</li> <li>• (Museum) Uitmail (electronic cultural newsletter)</li> </ul>
The Well-Off	<ul style="list-style-type: none"> <li>• Inspiration / exaltation</li> <li>• Personal development</li> </ul>	<ul style="list-style-type: none"> <li>• Friends and family</li> <li>• Free local newspapers</li> <li>• Posters</li> <li>• Leaflets and flyers</li> <li>• Television and radio</li> <li>• AD/Rotterdams Dagblad (daily newspaper)</li> <li>• Uitagenda (monthly cultural magazine)</li> </ul>
Senior Culture Vultures	<ul style="list-style-type: none"> <li>• Inspiration / exaltation</li> <li>• Personal development</li> </ul>	<ul style="list-style-type: none"> <li>• Free local newspapers</li> <li>• Friends and family</li> <li>• Metro / Spits (free daily newspaper)</li> <li>• Uitagenda (monthly cultural magazine)</li> <li>• (Museum) Uitmail (electronic cultural newsletter)</li> </ul>
Student Types	<ul style="list-style-type: none"> <li>• Innovation</li> <li>• Related to their own experience and identity</li> <li>• Popular music</li> <li>• Dazzling nightlife</li> </ul>	<ul style="list-style-type: none"> <li>• Social media (Facebook, Hyves, LinkedIn)</li> <li>• Friends and family</li> <li>• Posters</li> <li>• Metro / Spits (free local newspapers)</li> </ul>

	Aimed at / requirements	Media used
Sporting Families	<ul style="list-style-type: none"> <li>• Cultural activities aimed at children</li> <li>• Improving the information supply</li> <li>• Acquiring knowledge, passing on to their children</li> <li>• Nostalgia</li> <li>• Clear framework so people know what to expect</li> <li>• Adjusting the starting times to the children's needs</li> </ul>	<ul style="list-style-type: none"> <li>• Social media (Facebook, Hyves, LinkedIn)</li> <li>• Friends and family</li> <li>• Posters</li> <li>• AD/Rotterdams Dagblad (daily newspaper)</li> <li>• Television</li> </ul>
Simple Retirement Lovers	<ul style="list-style-type: none"> <li>• Nostalgia</li> <li>• Acquiring knowledge</li> <li>• Local activities</li> </ul>	<ul style="list-style-type: none"> <li>• Free local newspapers</li> <li>• AD/Rotterdams Dagblad (daily newspaper)</li> <li>• Television</li> <li>• Friends and family</li> </ul>
Survivors	<ul style="list-style-type: none"> <li>• Entertainment</li> <li>• Good atmosphere</li> </ul>	<ul style="list-style-type: none"> <li>• Friends and family</li> <li>• Metro / Spits (free daily newspapers)</li> <li>• Television</li> <li>• (Museum) Uitmail (electronic cultural newsletter)</li> </ul>
Modal Midlifers	<ul style="list-style-type: none"> <li>• Entertainment</li> <li>• Good atmosphere</li> </ul>	<ul style="list-style-type: none"> <li>• Free local newspapers</li> <li>• Friends and family</li> <li>• AD/Rotterdams Dagblad (daily newspaper)</li> <li>• Television</li> </ul>

## Colophon

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