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Factors driving the demand for contemporary art amongst individual buyers in South Africa.

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#580367

MA by Dissertation in the field of Cultural Policy and Management

Faculty of Humanities,

UNIVERSITY OF THE WITWATERSRAND

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DECLARATION

I declare that this research report is my own, unaided work. It is being submitted for the Degree of Master of Arts (Cultural Policy and Management) in the University of the Witwatersrand, Johannesburg. Where secondary material has been used (either from a printed source or from the internet), this has been carefully acknowledged and referenced in accordance with departmental requirements. I understand what plagiarism is, and I am aware of the department's policy in this regard. This research report has not been submitted before for any degree or examination in any other University.



Ann Roberts

13 March 2020

ABSTRACT

The purpose of this study is to investigate the motivations of individual contemporary art buyers in South Africa, in order to inform strategies for sustainability within the sector. The study reviews the nature and state of the contemporary South Africa art world and theories that attempt to explain the development of taste and actor behaviour in the field.

An initial online survey reported a difference between the motivations of black and white buyers and therefore in-depth interviews were conducted with black buyers to understand these differences. White buyers' motivations were revealed to align with those reported from the global north, with detracting factors being market opacity and information asymmetry. These factors were found to be barriers for all potential entrants into the field. The study shows how the dominance of western notions of what is legitimate culture and what is valid contemporary art, along with the impact of colonisation and Apartheid on the psyche and education of black buyers, has led to fewer black buyers entering the market. This study reveals that, those who do buy, are finding a Third Space and using their art buying activities to assert the importance and legitimacy of their own African cultural capital. It offers an understanding of the importance of African cultural capital for buyers within the context of the South African art market that will assist art world practitioners to strategise sustainability.

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1 Aim

This study aims to determine the factors that have driven demand for contemporary visual art amongst individual buyers[1] in South Africa to enable stakeholders to develop strategies to grow the market to be more inclusive and thereby improve the sustainability of career artists.

2 Introduction

The moment when money changes hands and the ownership of an artwork transfers from one to another is the culmination of multiple threads, all leading to the transaction.

The journey starts with the artists. What country are they from? What is their life experience and nationality, and where were they educated? What stage of their career are they at, and who has validated their existence as an artist?

The artwork is created and has both physical properties of medium and size, and symbolic properties of content and the story it tells.

The value, and therefore the price, of the artwork needs to be established. Here we enter the area of the art world that is unique in the economic market and is often opaque. It has its systems and rules of operation that are often a mystery to an outsider.

The work is then placed “in the market”. It is exhibited publicly or shared privately, often without initially revealing the price, through a variety of channels.

The buyer will then decide whether to acquire the work. But just as the artwork has had a trajectory accumulating symbolic and physical value as it heads to the market so does the buyer of the work have a path leading them to the point where they want to, and can, buy the artwork.

[1] Individual buyers as distinct from corporate or institutional buyers

Who are their parents, what were their interests? What country and part of society within that country where they raised in? What are the social structures or worlds they inhabit? What education do they have, who are their friends, where do they work and what work do, they do? What is their experience of the world? Have they travelled? What is their personality, and at what stage of their career or life are they at? What disposable income do they have and what can they afford to spend? What is their "disposition"?

To buy a work of art the buyer needs to want it. What are their reasons to want it; what purpose does the artwork serve in their life? What do they know about art, where do they find out about art and where do they discover or see the work to buy?

All these elements intersect for that moment to occur where money changes hands and the artwork is transferred from the seller to the buyer.

In my research, I will be investigating the threads that build the tapestry of motivations for an individual to buy art in South Africa and where the threads might be broken, preventing a person from entering the field of art buying.

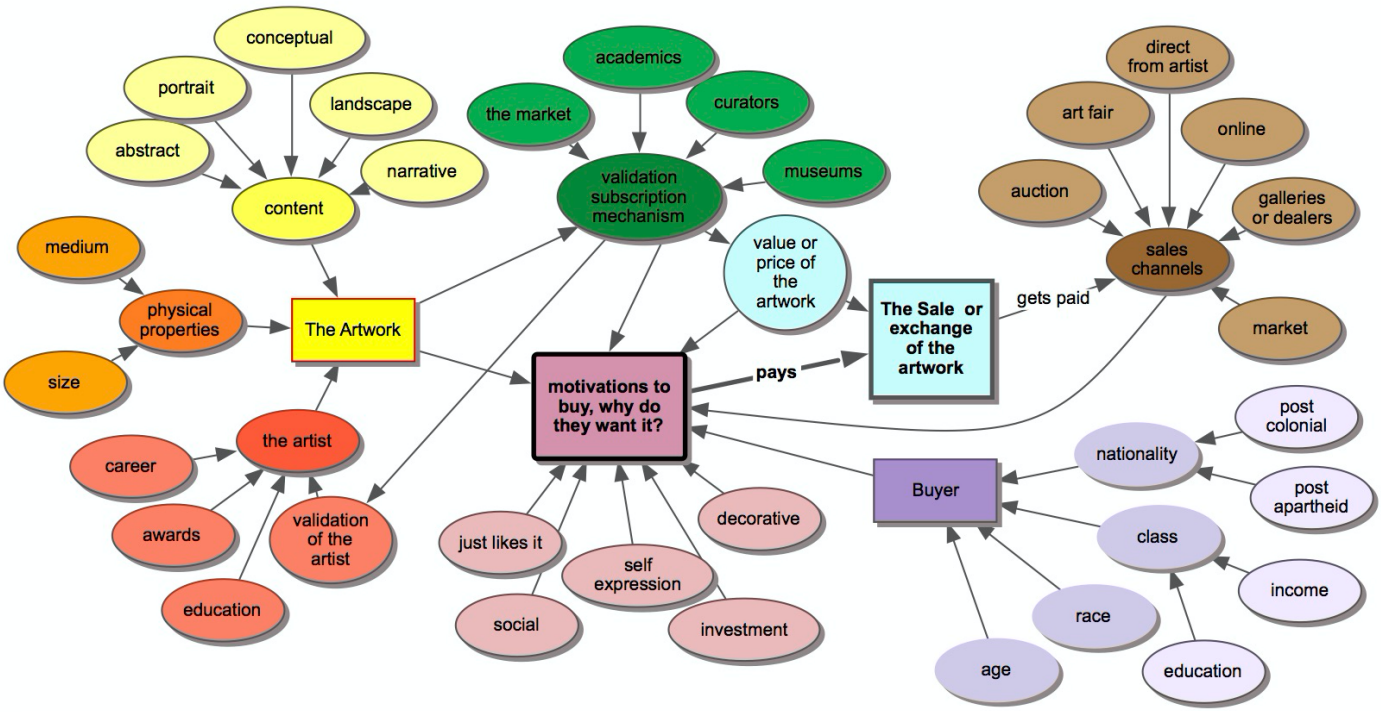


Figure 1 Path of an Artwork to its Owner

3 Rationale

> Africa needs to develop a strong and robust domestic market for contemporary art. “New money” collectors need to be encouraged and embraced to protect local artists from the vagaries of the global market and the need to shape their identities and practices to the global Eurocentric context (Kabov, 2015).

The contemporary art market in South Africa contributes significantly to the South African creative economy and economy in general. The total South African market for the visual arts in 2010 was estimated at over R1-billion across market segments and the South African Department of Arts and Culture (DAC) report suggests that there is a “significant untapped domestic market for the visual arts” (DAC, 2010:9). However, in the ten years since the report’s publication, there appears to have been little growth in the domestic market, and very little research into the demand side of this market. Corrigall (2019:21) reports that since 2008 an additional 50 new commercial galleries or art institutions have been introduced to the landscape, however this is not necessarily matched by a growth in buyers and collectors. The static visitor statistics for the Joburg Art Fair, now ArtJoburg, of 10 000 visitors in 2010 and 10 000 visitors in 2019 could be seen to imply this (Corrigall, 2019:23).

The lack of growth among the SA art buying public has forced the South Africa commercial art galleries to look abroad for a sustainable market which has led to “western” or European tastes driving the production of contemporary art in South Africa (Corrigall, 2019:17). To reverse this trend, and to ensure the future of a vibrant and authentic South African contemporary art eco-system, a buoyant, diverse and expanding domestic market for South African art is required. Until this study the factors driving demand for contemporary art amongst individual buyers in South Africa has not been comprehensively researched and it is here that my report will fill a gap in existing knowledge.

The position of Chinese artists just behind American artists on the global contemporary art auction market is driven by their “effervescent domestic market”

(Artprice[2], 2019) indicating the importance of a vibrant local market to the success of a country's artists internationally. The importance of a strong domestic market is reflected in the stability of prices for Chinese artists, supported by their local market, as opposed to those supported by western markets whose prices dropped during the 2008 global financial crisis (Kabov, 2015).

My research investigates the factors driving demand for contemporary art in the domestic South African market. I establish the motivating factors that impact and influence artwork purchasing activities by reviewing similar studies in other parts of the world, interviews with current art buyers in South Africa and information gleaned from conversations I have had with buyers over my years in the art-world. Based on this data, I constructed a survey that was distributed online across my network and beyond. The reason for this survey was to establish the degree to which the factors I am investigating are motivations for buying art within my sample and how they might vary across of different groups of South African art buyers. This research will inform future strategies to grow the base of art buyers across different demographic groups to diversify the market and thereby enhance the sustainability of the South African contemporary art market.

3.1 Practical and Societal Relevance

Art collectors start by buying their first, second and third artwork building up to owning significant collections. It is important to understand the motivating factors driving the market at all levels as it is from a large first-time buyer base that future new collectors will emerge.

There has been much talk in the contemporary art market about needing to reach a more diverse audience and get more black African collectors into the market with the understanding that this is where the growth in the market will come from. My research illustrates that race is a significant determining factor when respondents rank their motivations for buying art. Emerging from our ruptured history (von Holdt, 2012) I believe an understanding of black Africans who have bought art, their

[2] A French online art price database

motivations and how they differ from the traditional white buyer base could lead to creating a more inclusive and representative market for contemporary art in South Africa. African art is presently supported by “old money” and it is vital that “new money” is encouraged to engage (Kabov, 2015).

3.2 Scientific Relevance

I believe this study to be the first mixed methods research focusing on individual buyers’ motivations in South Africa. It will establish a base level of data that future studies within the contemporary art market in South Africa can build upon and compare with. As part of the field of Cultural Policy and Management, the results could inform future studies on social participation in elite cultural fields in South Africa. In addition to contributing to the academic field this study will assist policy makers, arts managers, gallery owners and other art dealers to review their practices and make informed adjustments to their approach to attracting new and diverse local audiences within the context of post-Apartheid South Africa.

4 Background

In this chapter I will be drawing extensively on recent art market reports from a variety of sources from around the globe to understand the present nature and state of the contemporary art market within the context of global and local economies. I will examine how the market might have shifted and changed in recent years and now differs from traditional and historic views of the art market. This understanding of the present will inform how the past and current theory and literature can be applied and whether it remains relevant within the current South African context.

All reports on the art market are limited by the data available to researchers. Most data regarding the art market is gathered from auctions, the key vendors in the secondary market[3], where the results are publicly available (Haden, 2019). Measuring actual growth in the market is made difficult by the lack of turnover

[3] The secondary market is where an owner of an artwork, having purchased it sometime before, resells the artwork (Velthuis 2011).

information from dealers or galleries. Most contemporary art is sold via these channels or direct from artists, so available auction results are not necessarily the best indicator (O'Toole, 2019). Online art selling platforms have allowed for limited additional information. This intrinsic opacity and difficulty in accessing primary market[4] sales information is an inbuilt limitation to art market researchers' ability to comprehensively analyse the market.

4.1 The Global Art Market

Haden (2019) estimated the total art global market in 2018 to be over $60 billion. Notable trends within the global art market reflect more general trends in the broader global economy: The rise of online platforms (TEFAF[5], 2017), uncertainty and instability of the market (ArtTactic, 2019 and Adam, 2018), and the emergence of China as a key figure (ArtPrice, 2019).

There has been a significant increase in the number of online platforms for selling contemporary art, which has enticed new buyers into the market and introduced many emerging artists to the market (TEFAF's Art Market report[5], 2017: 64). Millennials[6] are the next generation of art collectors and, being totally comfortable and immersed in the new technologies, are purchasing art online. One quarter indicate that they prefer to do so versus buying in person. TEFAF believes that as this segment grows, sellers who continue to believe that "serious sales" can only take place in person are at risk of not reaching this market. Sixty seven percent of dealers expect an increase in online sales and 29% expect a decrease in sales via their bricks and mortar galleries.

My research investigating the buyers of art in South African addresses an under-researched segment of the market that is the main concern of art dealers globally.

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[4] The primary market is where an artwork comes onto the market for the first time.

[5] The European Fine Art Fair

[6] 18 -34-year-olds

Over 71% of dealers in the TEFAF report cited their primary business concern being the acquisition of new clients. My study will provide South African dealers with insights that will give them the ability to develop strategies to reach new clients in the local South African market.

The 80s saw a boom in the global art market with art being introduced to financial markets as an asset class, albeit an extremely opaque one. This brought in a new segment of buyers whose motives were either to diversify their stores of wealth or speculate for capital growth. The global financial crisis in 2008 impacted the art market as it did all markets. Adam (2018) notes that the art market recovered rapidly but the make-up of the market changed. The top end of the market, artworks priced over US$1 million, "exploded" while the mid-level remained sluggish. China, with its growing class of billionaires, provides a new buying class dominating the high-end market.

Adam (2018) notes the emergence of private museums, particularly in countries where the state does not have the will or resources to invest in the arts. This phenomenon is clearly at play in South Africa. Adam goes on to note the blurring of lines between art, entertainment and luxury goods with specific reference to Damien Hirst.

Surveying a variety of topics relating to art as an asset class Art Tactic's[7] *Art and Finance report 6th edition* (2019:138) proposed that art is a value preserving asset class rather than an investment vehicle where growth in value is desired. The art market peaked in 2016 and since 2017, political and economic uncertainty, climate change, rapid technological advancements and social inequality have dominated the headlines.

> *Financial Markets Face Fresh Wave of Political Uncertainty: 'There's Literally Nowhere to Hide'* Wall Street Journal 15 Jan 2020

[7] London based art market research and analysis company

Revealed: 50 million Facebook profiles harvested for Cambridge Analytica in major data breach The Guardian 17 March 2018

These Billion-Dollar Natural Disasters Set a U.S. Record in 2017
The New York Times 8 Jan 2018

World's richest 0.1% have boosted their wealth by as much as poorest half
The Guardian 14 Dec 2017

We live in a changing world fraught with uncertainty and since 2017 global trends in the art market suggest that it has failed to keep up with the growth in global wealth. ArtTactic (2019:46) contends that the appeal of the art market is severely constrained by the lack of transparency and perceptions of this as a barrier are growing. They question whether a more regulated, professional and trustworthy market would expand the art market's client base. ArtTactic proposes that the art market needs to address the deteriorating trust in it. My research explores this issue of trust and confidence in the South African market, analysing the motivation of current buyers of contemporary art in South Africa and extrapolating what the barriers might be to new buyers of all races - and black buyers in particular - entering the market.

Turnover of contemporary art in the auction segment has doubled in the last decade (2009 to 2019) and while American and Chinese artists dominate with 66% of all sales, the latter is supported by their "*effervescent domestic market"* (Artprice's *The Contemporary Art Market Report*, 2019). The report contends that contemporary African art is entering a new era, having finally captured the attention of international collectors. Given that the success of Chinese artists is attributed to the buoyancy of their domestic market, I question whether South Africa's presence and rise within the global art market is sustainable given the lack of growth in our domestic market. ArtPrice (2019) data of some interest to my study is that over half the works sold were for under US$1000 and paintings dominated, representing 68% of all sales. The sustainability of a broader base of career artists is possible when there is a base

of buyers supporting artists across all price points and not just at the very top end where relatively few artists benefit.

4.2 The African Art Market

The IMF identified six of the ten fastest growing economies as being in Africa which Brady (2019) contends has led to the growth, albeit slow, in the African art market. In line with global markets, Cosgrobe (2019) found the market for African art less buoyant in 2019 than 2018 due to market instability, noting that global auction sales of African modern and contemporary art down by 11% for the first half of 2019 compared to the first half of 2018.

There is contradictory information regarding the origins and nationalities of buyers and collectors of African art. O'Leary (in Maima, 2019) says from Africa and Cosgrobe (2019) says Europe and America. These contradictions could be attributed to the selective scope of their studies and access to comprehensive market information. O'Leary does not mention the race of the buyers "from Africa" as they too could be European in origin.

In the experience of Phillippe Boutte, director of the French fine art photography gallery Magnin-A, ten years ago there was almost no African art market. But, since then, western markets have become interested in African art, and growth in the market is often from young Africans who have studied abroad and are returning to their homes in Africa where they start to collect, but slowly (Brady, 2019).

The suggested growth in demand for African contemporary art can be attributed to the changing of taste patterns where the composition of cultural capital[8] is responding to societal trends towards multiculturisation[9] and greater inclusivity. (DiMaggio and Mukhtar, 2004) Multiculturalism, DiMaggio and Mukhtar argue, is

[8] Types of tastes, knowledge and modes of appreciation that are institutionally supported and very broadly acknowledged to be high status and worthy of respect.

[9] The process of making something multicultural.

steering buyers away from European notions of culture and towards the African continent. This attribution of causality is cautiously supported by Schneider (2019) who contends that the African continents' collector base is growing steadily, referencing a London auction house's 2019 auction that was dedicated to Modern and Contemporary African Art as having been dominated by African collectors with 70% of buyers being from the African continent. Unlike Asia, the continent itself, however, lacks its own hub or "arts capital" leading to fewer than 1000 artworks being sold at auctions on the continent in the first half of 2019 (Schneider, 2019). This confirms the sluggish nature of domestic markets on the continent and in South Africa. Hannah O'Leary (in Schneider, 2019), head of Modern and Contemporary African art at Sotheby's, contends that what is lacking in the African art market is: "… an infrastructure. There is a real lack of public support. We are seeing lots of raw talent, but we need more of a market structure to support their careers".

My research is intended to analyse the buyers of art in South Africa to enable stakeholders to create a more sustainable domestic market eco-system in South Africa that supports the careers of artists.

Whilst now bemoaning the sluggish domestic markets in Africa, in 2015 O'Leary (in Maina, 2015) attributed the growth in the international African art market to growth in the domestic markets in Africa, remarking that the market for African art was dominated by collectors from Nigeria and South Africa. These seemingly contradictory statements from O'Leary could indicate a decline in African buyers between 2015 and 2019.

Contradicting the assertion that the African art market is dominated by African buyers is Cosgrobe (2019) who undertook research surveying 125 collectors of African Art via the iMO DARA[10] platform. With regards to who is buying African art,

[10] This is an online platform which has as its aim: "Connecting African art collectors with dealers and scholars, based on a foundation of knowledge about the origin, use & distinguishing features of listed pieces" https://www.imodara.com/

Cosgrobe (2019) reported that the African art market is not diversifying. Only 2% of the collectors surveyed were from the African continent, while 63% were from Europe and 32% from North America. This distribution of collectors would seem to confirm the literature, which I will review later in this report, that the art world is Eurocentric. The positive result of Cosgrobe's research was that 7% of survey respondents were under 35 years in 2019 compared to only 2% in 2018, an indication of some potential growth. While the collectors surveyed included collectors of historical African art, I believe this information to be relevant to questioning the dominance of African buyers of African art. What none of the research investigated was whether the African buyers from South Africa where black or white.

O'Leary's statement (in Maina, 2015) that, "As individuals in those countries become wealthier, they spend more money on art" implies that the emerging black elite in South Africa are embracing the art market. However, my research questions the degree of truth in O'Leary's assertion.

Anne-Claude Coric of Brussels gallery Templon, who participates regularly in the Cape Town Art Fair, says that over the years they have seen new collectors emerging in Africa, but it remains marginal compared to other developing countries. This she attributes to art collecting being perceived as an elitist movement in countries plagued by economic and social challenges (Brady, 2019).

To conclude it could be argued that the market for African art has grown from a small base but to grow exponentially and not require pandering to European tastes it will need to encourage and embrace buyers and collectors from the African continent.

4.3 The South African Art Market

In this section I will review recent studies of the South African cultural economy in general and the visual art market specifically. Labuscagne (2010) surveyed visitors to the Joburg Art Fair in 2007 and 2008 and interviewed a number of art world professionals about who they thought the art "public" in South Africa was. Only 7% of survey respondents indicated they had bought art at the fair and only a couple of collectors were interviewed. I will return to Labuscagne in my literature review. I have not, however, found any studies that have their focus on the buyers of contemporary visual art in South Africa.

The most comprehensive and recent research into the South African Art Market is Corrigall (2019) in her study: *South African Art Market Pricing and Patterns*. As with all art market research the study was limited by the European convention of primary market protagonists not being willing to be transparent regarding sales and prices.

While noting that the contemporary art landscape in South Africa has grown, with 50 new contemporary art platforms entering the arena since 2008, 70% of them being new commercial galleries and the remaining 30% institutions, Corrigall argues that the domestic market has not kept pace, citing stagnant attendance figures for the Johannesburg Art Fair over the past decade. The consequence of this, argues Corrigall (2019:23), is that South African galleries have become more focused on the global art market looking for collectors in other parts of the world. Fifty three percent of South African commercial galleries participate in international art fairs.

Corrigall interviewed gallerists in South Africa's two main "art centres", Cape Town and Johannesburg. Many of the Cape Town galleries suggested that 70% of their market was made up of tourists or foreign residents in the city. This bucks the international trend where local buyers dominate local markets (Kabov, 2015). Corrigall did not mention in her report the percentage of buyers in Johannesburg that were international. While the Department of Arts and Culture (DAC) reported in 2010 that South African galleries indicated that 80% of their sales were to local buyers (DAC, 2010:88), Corrigall's 2019 report suggests that the market for contemporary art in South Africa is shifting away from local buyers towards foreign buyers - at least for Cape Town, if not for Johannesburg.

Having the commercial galleries looking outside South Africa for their market has consequences for the local market. It indicates that the local galleries are not committed to, or convinced of, their ability to develop the local market for local artworks and the cultural value of South African artworks will be skewed by western tastes. Emerging talent will be encouraged to seek "greener pastures" and move to the countries where they have found their market contributing to both and economic and cultural "brain drain" (Kabov, 2015). The data from my study will show that this outward focus is a limiting factor when trying to grow a local market.

The demographics of the South African population are not represented by artists in the South African contemporary art world as can be seen in Corrigall's (2019:19)

statistics. Of the 654 artists represented by the 52 commercial galleries surveyed a lack of representative diversification is evident, with 58% being white and 57% male. In 2010 (51 & 52) the DAC found that of the 1200 arts organisations (both commercial and non-commercial) surveyed, 89% reported white ownership or management. My own brief investigation of the larger commercial galleries surveyed[11] by Corrigall indicates that all but one is white owned and managed. Of the eight commercial gallerists interviewed only one is a black African. Both the two major art auction houses[12] dealing in contemporary art are predominantly white owned and managed. This lack of representation could be perpetuated by the South African art market's international focus.

[11] Goodman, Stevenson, Everard read/CIRCA, SMAC, Gallery MOMO, Whatiftheworld, Blank Projects, Afrinova, David Krut Projects, Christopher Moller, Barnard, Kalashnikov, Ebony Curated, Melrose, Salon 91, Lizamore, 99 Loop, Candice Berman Contemporary, Eclectica, Guns&Rain, Worldart, In Toto, AVA, Gallery MOMO.

[12] Strauss&Co and Aspire

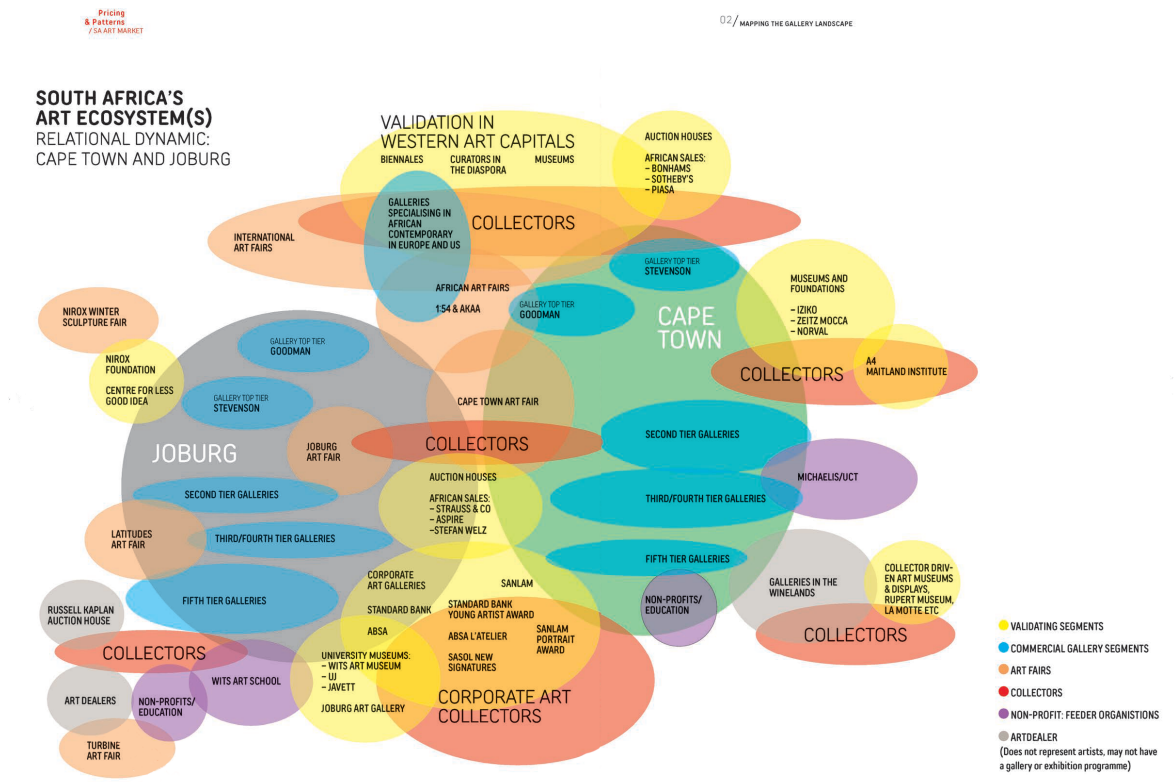


Figure 2: South Africa's Art Eco System. Corrigall (2019)

BASA's[13] research document Arts Track (2015a:78) noted the following trends in interest in various forms of art and culture. In their category "sculpture, painting, photography" (visual art) 35% of white people surveyed responded that they were interested and 8% were passionate compared to 27% of black respondents who are interested with 9% who are passionate indicating a small bias towards more white people being interested. The combined figures, however, indicated an almost 15% decline in interest since BASA's 2013 survey. The report states: "What is of concern is the low to negative growth over the past few years in the more purist art genres such as opera, theatre, literature, ballet and sculptures etc". (BASA, 2015a:80). The respondent's frequency of attending art exhibitions was down amongst all groups since the 2013 survey. This decline in interest is of concern for the sustainability of

[13] Business and Arts South Africa

the visual art economy and requires further investigation which my study aims to provide.

Forty four percent of black respondents and 27% of whites indicated they were only interested in artworks by local artists. White respondents had a greater interest in international visual art (BASA, 2015a:90). My study investigates this further.

BASA's *Instant Grass: Current & Potential Audience for Visual & Performing Arts in South Africa* (2015b) research looked at the drivers and barriers for audiences (aesthetic not economic consumption) of visual and performing arts with the goal of creating authentic audience development strategies. The research participants were LSM 7-10[14] aged 18 to 35 years. Although not specifically about buyers of visual art it is interesting to note the feedback researchers received from the audiences they surveyed as it might give insights into what is preventing or creating a barrier for potential future buyers.

The research claims that the youth audience for arts in South Africa want to be socially relevant and accepted by their peers and be part of the alternative arts community. Most South African youth, however, believe the arts are "just not for me", they are for "white people, the elite, old people, hippies, people who take life too seriously… " (BASA, 2015b:69).

The respondents felt that the artistic communities can be closed to outsiders and are often perceived to be intimidating and elitist if one is not part of them.

Amongst the feedback from respondents of all races were the following remarks:

> "I find the Joburg art scene exclusive, inaccessible and intimidating. Cape Town is a bit better but it's still scary if you're an outsider".

[14] Living Standard Measure LSM 7-10: Consumers in this bracket have the most household possessions and their needs are satisfied.

Much of the visual arts scene is perceived to be “too intellectual” and consumers cannot relate, or do not understand artist motivation and exhibition blurbs.

> “I never understand what the board next to the picture says. The whole thing alienates me”.

Respondents thought that the arts are undervalued as cultural capital with

> “many potential consumers unaware of the benefits attained through consuming culture. This often starts at home level and is facilitated through lack of conversation in daily life”.

The BASA (2015b:112) report suggests that the art world needs to “rework the product” and find ways to make the audience comfortable and less intimidated at exhibitions. It suggests that there is not enough hype created around the visual arts and the audience needs more opportunities for selfies and #tagging. I believe these suggestions, while having some merit, to be superficial and that there are far deeper and more systemic challenges faced by society and the art world that need to be interrogated and understood to address the lack of diversification and growth amongst the South African art buyers.

Labuscagne reported that the art fair event would welcome the audience who reported to BASA’s that they found the “gallery intimidating” (2010:96&7). At the time of the first edition of the fair in 2008, many journalists wrote and published “how to buy” guides leading up to the fair. There was an assumption that there was a big difference in knowledge between those in the art public and those outside of it (2010:110). An arts journalist in Labuscagne’s study reported two of his art world colleagues - a museum director and a municipal arts and culture director – did not support the fair as they believed art belonged to the public and commented that they found the private buying and selling of art distasteful. This position, he proffered, runs in direct contrast to the UK and USA where the governments offer interest free loans to the public to buy art as they believe that ownership encourages appreciation and understanding of art and develops culture and ideas of cultural heritage (2010:262).

In 2010 the DAC[15] undertook a report on the visual arts sector in South Africa surveying over 350 artists, businesses and organisations working in the visual arts sector and individual studies on museums and collections, education and training in the visual arts, funding, the policy and legislative environment for the visual arts and the position of the visual arts at a provincial level. Whilst acknowledging the significant profile of contemporary South African art globally, the report points to its own failure to study the individual buyers of visual art in any depth. The summary of the research notes states: "The study did not extend to an analysis of people who actually buy visual artwork (for which there is no existing data)" (DAC, 2010:3), and furthermore, "Within the scope of the present project, it was not possible to conduct a detailed profiling of buyers" (DAC, 2010:70). This is a gap in the knowledge that my research aimed to fill. It has been partially addressed by Labuscagne (2010) whose survey focused exclusively on visitors to the Joburg Art Fair, of whom only 7% indicated that they had bought art at the fair. Labuscagne conducted interviews with art world practitioners about their thoughts on who the buyers were but did not interview many buyers specifically. The buyers, I believe, warrant both additional qualitative and quantitative research to improve our understanding of the demand side of the contemporary art economy in South Africa.

The DAC (2010:10) found that approximately 2% of the South African population visited public art museums or collections[16] a figure significantly lower that the estimated 21% of Australians or 43% of Americans who visited these types of institutions in their own countries. The report suggests that publicly accessible art museums and collections – and by extension, the contemporary segment of the market more generally – play a marginal role in most South African's experience of the visual arts, with contexts such as 'Art in the Park' providing substantially more accessible platforms for people to experience the visual arts (DAC, 2010:70).

[15] South African Department of Arts and Culture

[16] It should be noted that this is for "aesthetic consumption" reasons, looking at and engaging with the work – involving minimal or no economic transaction as opposed to "market" consumption of the visual arts where artworks are purchased.

Since the DAC's 2010 report there has been a significant growth in the number of public arts institutions in South Africa (Corrigall, 2019) and it would be interesting for future studies to investigate the impact of these institutions on the South African public's engagement with the sector, something which is not within the scope of my research.

Per the DAC report (2010:72), market demand for the visual arts within the national and regional economy is confined to a comparatively small economic elite. They contend that while middle and upper middle-income earners represent the largest section of this market, this area of demand is "most vulnerable during periods of economic recession, when more basic priorities take precedence over 'income-elastic' products such as the visual arts" (DAC, 2010:72). They did not investigate race as a factor when identifying the "small economic elite"; an omission that my research addresses.

Bemoaning the lack of papers written about the South African art market, Olckers, Kannemeyer and Stevenson (2015:8) in their paper *Art Critic Index: A Proxy for Cultural Value in the Context of the South Africa Art Market* refer to publications which relate to the formation of value or demand for artworks on the secondary market in South Africa attempting to assist buyers to understand the opaque creation of value in the market. None explore the market from the perspective of the buyer as my study does.

My study has looked in depth at the relationships between race, class, collection size, mediums and purchasing channels. Data from my research highlights the behaviours and motivations of different groups within the art buying market, with particular focus on black buyers, adding a vital component to the existing research outlined in this section and enabling future strategies for reaching the untapped market to be focused and relevant.

5 Literature review

Scientific classification must include the (objective) material properties including the body, that can be measured and symbolic properties, knowledge of the social world, which have meanings and need to be considered to uncover how classification is produced and deciphered (Bourdieu and Wacquant, 2013:11) I will structure this chapter by reviewing the literature about objective properties first, followed by the literature regarding the symbolic or subjective properties.

5.1 Introduction to the literature review.

My study of the factors driving the demand for contemporary art amongst individual buyers in South Africa can be broken down into several intersecting elements: the economic and symbolic properties of the artwork, the art market as both an economic and social field and an individual's economic, personal and social experience of the field.

In my background discussion, I articulated the art market landscape from the economic perspective of market researchers regarding subscription and validation in different markets and how it has changed over time. In my literature review and the analysis of my data I will follow French sociologist Pierre Bourdieu's method of scientific enquiry, tackling the subject academically from objective and subjective perspectives. I will apply key concepts from Bourdieu's *Theory of Power and Practice*, *Theory of Class Distinction* and *Theory of Cultural Production*. These theories were developed by Bourdieu in the mid to late 20th century and I will use research by *The Next Generation* (Thatcher et al (eds) 2016) of Bourdieusian scholars to place a new lens on the theories, and concepts from the theories, to contextualise their application to my study within the 21st century. I have included a glossary in my paper to define the key terms used by Bourdieu so as to enable a flow in my argument.

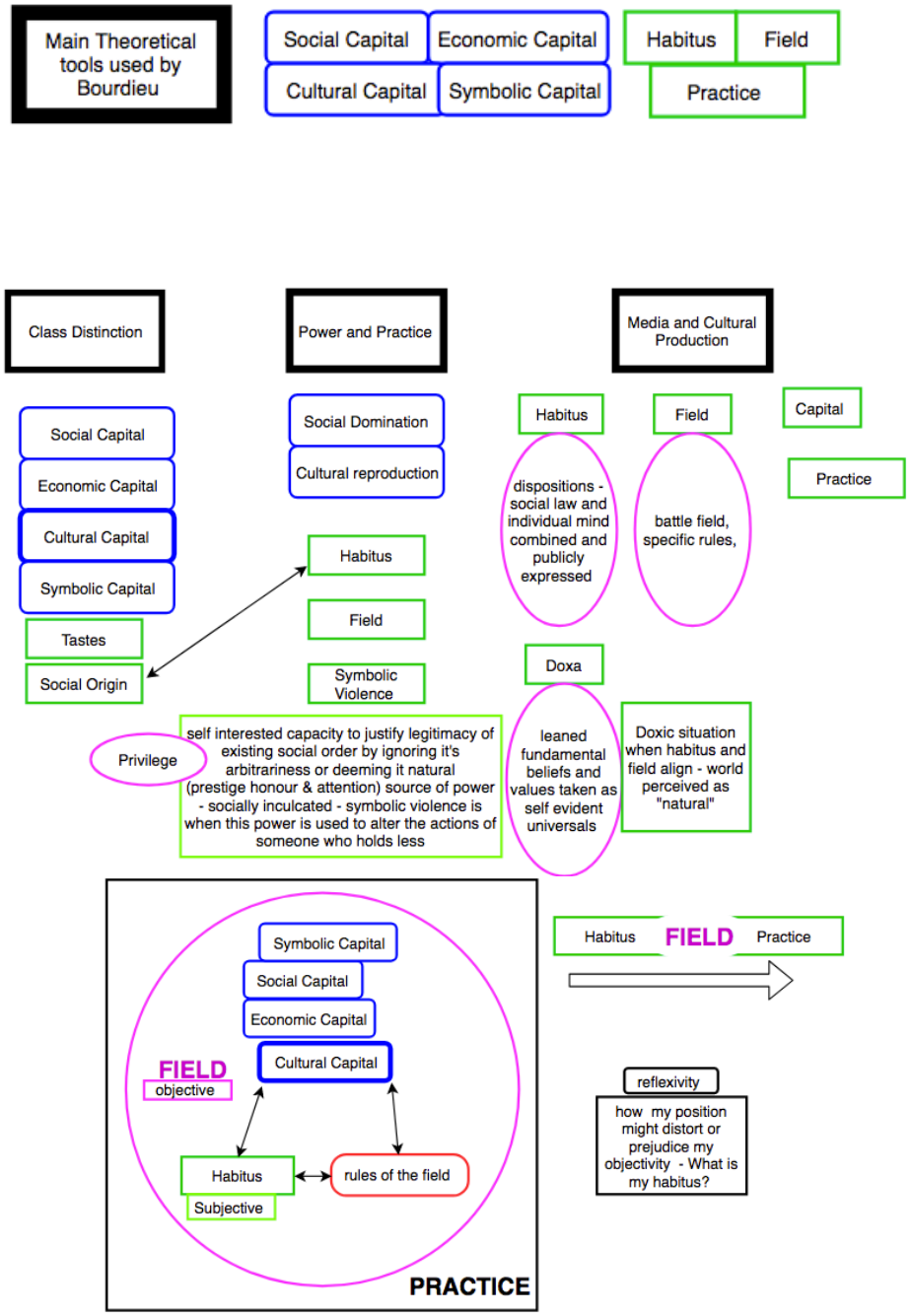


Figure 3 Mind map of Bourdieu's Theories and Concepts

Bourdieu's *Theory of Power and Practice* is about the interrelationship between individuals, with their own motivations and intentions, and social structures or systems. The main concepts within the theory are capital (cultural, social, economic

and symbolic), habitus and field. Secondary concepts I will be investigating in relation to my study are cleft habitus and symbolic violence.

Theory of Class Distinction as articulated in Bourdieu's seminal work *Distinction: A Social Critique of the Judgment of Taste*, is that an individual's cultural capital is asserted by their aesthetic disposition, marking their dominance over and distinction from the lower classes. The application of this theory is critical to my study as a means of understanding the contemporary art world, providing the tools to explain the social construction of what legitimate contemporary art is and how participation in the field is constrained.

Within society, groups who are in possession of large volumes of cultural capital or non-financial assets, such as education, are culturally dominant. They are able to exert this dominance over sectors of society in possession of less cultural capital. The tastes of the dominant class are deemed legitimate by society in general. Dominated cultures do not have the means to contest this construct: lacking the methods of understanding or terminology to describe the phenomena they accept the legitimacy of the dominant culture's tastes as truth (Schubert, 2014:179). This acceptance of dominant tastes as truth is symbolic violence inflicted upon the subaltern. Bourdieu uses the distinction between the tastes of the dominant and the dominated as a tool to distinguish between different class based social groups. Cultural capital, when combined with social and economic capital, is a means of social reproduction ensuring the position of the dominant class is maintained. In addition to their economic and social capital, parents share their cultural capital, or "lack" thereof, with their children which contributes to the construction of the child's habitus or acquired set of dispositions that they take forward into their adult life. This habitus defines the individuals place in society (Crossley, 2014:93).

Bourdieu was theorising predominantly in the stable and racially homogenous French society of the last half of the 20th century but did do ethnographic research within colonised Algerian society. In Algeria he found the dominant culture of the European colonisers was presented as a legitimate truth as colonial occupation ruptured traditional Algerian society. Bourdieu introduced the concept of "habitus clive" or cleft habitus to describe Algerians caught between two conflicting worlds, that of their pre and post-colonial existences. Bourdieu, however, did not allow for

the possibility that persons in this position have the critical and reflexive capacity to navigate between and across these conflicting fields (Silverstein and Goodman, 2009:19). Further literature about cleft habitus will be discussed later in this chapter.

In *Theory of Cultural Production* Bourdieu asks that we question who has "created" the creator of the cultural good, specifically art or literature. This requires the study of the habitus of the both artist themselves and their influences, detractors, endorsers, and critics (Bourdieu,1993:76).

I will be reviewing Bourdieu and key theorists of the consumption of cultural goods and the critiques of those theories when applied outside of a western cultural and socio-demographic environment to establish how these theories might or might not be applied the South African contemporary art buyer. I will draw on Bourdieu's concepts of habitus and symbolic violence to understand how race and class in South Africa impact the art field using contemporary Bourdieusian scholarship to apply his tools to the context of my study.

Due to the highly racialised nature of South African culture it is necessary to review literature that deals with race as a factor in determining taste and "actor" behaviour within different contexts. I will also review literature about the market for visual art generally, and contemporary art specifically, to inform my study and the types of information prior research has found to be significant.

I will begin by reviewing the literature concerning the objective functioning of the field of contemporary art. This will include the cultural economy, nature of an artwork as a "product" and how value and price of artworks is established through validation, subscription and notions of taste. In addition to Bourdieu, the primary researchers I refer to are Throsby and Velthuis and I will review their papers relevant to my study with additional papers by other authors that have more specific contemporary art, local South African or African perspectives.

I will then review literature concerning the subjective external social functioning in the field of the art-world, the individual's disposition and understanding of the field and the factors at play. I will turn to literature by Masoero (2015) who applies Bourdieu's field theory to explain how power is distributed and symbolically constructed and how

evolving social positions and internal mental dispositions are created and maintained.

5.2 Objective Factors

5.2.1 Heterogeneous Goods in The Cultural Economy

Bourdieu suggests the economy for cultural goods has several distinct properties. Cultural goods require institutions of legitimisation, referring to those individuals, groups or institutions that declare what is “art” of high status and what is of lower status, popular or mass culture goods. Second, art is valued by the way it is “consumed” – an object that is purely aesthetic and has no function is of higher value than that which serves a practical purpose (Bourdieu,1993:220).

Common use in South Africa is that there are two submarkets: the primary market where the artwork of a living artist is sold for the first time and the more transparent secondary or auction market (traditionally deceased artists but this is changing). Velthuis (2013:35) supports this definition but Throsby (1994:5) describes the art market as a “series of linked submarkets”. He asserts that the primary market is decentralised and unorganised, composed of individual artists, galleries, local fairs and private buyers. For Throsby the secondary market is the institutionally recognised established artists, galleries and collectors in the main art centres of the world culminating in the highest level being major auction houses. This elevation of auction houses to the “highest level” would be contested by commercial galleries as they contend that auction houses are purely market driven and consecrate no cultural capital on the artworks sold (Thornton in Kidd, 2016:44). The antagonism of the primary towards the secondary markets or from galleries towards auction houses is due to the purely demand driven nature of pricing which could be lower than the original sale of the artwork, negatively affecting the market for a living artist, or could be much higher than their prices on the primary market which could in turn set prices at an unsustainably high level. Galleries are reluctant to sell to buyers who might place the work on auction shortly after buying it with the hope of turning a quick profit, colloquially termed “flipping”. One gallerist interviewed by Velthuis (2005:2) asserted that art loses its “emotional value and degrades into capital” when it appears on auction.

Buyers approaching art as an investment want to capitalise on the advancement of an artist's career over time, being able to turn their investment into cash when the artist's "star" rises (Velthuis, 2011). A black buyer interviewed by Labuscagne (2010) remarked that whilst he only bought work from "career" artists as their work was more likely to retain or grow in value over time. Increase in economic value was not the primary reason for this buyer which he identified as his personal connection to the artist and their work.

The factors, other than physical size and medium, influencing the price in the primary market is the artist's work history, career milestones, such as museum shows (Velthuis, 2005:108) and the opinions of "experts". As noted by Kidd (2016) galleries can play a key role in building the career of an artist by placing their work in significant collections and institutions and affording the artist the opportunity to exhibit in prestigious exhibitions and getting credible writers to write about the artist's work. In addition to these factors, in the secondary market prices are determined by the provenance of the work (who owned it previously, the work's life story), historical rates of return on the artist's work over time and demand by the market. Throsby (1994:7) notes that there is no evidence that the art experts can consistently outperform the market in judging the potential of currently traded art, thus bringing into question the notion of art as an economic investment.

Distinguishing between the occasional buyers of art - those who own less than 10 artworks and collectors, and those who own more than 10 artworks - Zwaans (2015) investigates their differing motivations in buying contemporary art. The research was conducted at a single art fair, Art Rotterdam 2015. The empirical results indicated that when social and financial motivations were foremost, the buyer would hold a large collection and when the artistic motives were relatively more important, the buyer would possess a small collection. In my study I will investigate how motives of buyers differ, relative to the size of their collections. In Zwaans (2015:56) for collectors, the social process and reputation of the artists play key influential roles whereas for occasional buyers' decorative motives lead. The research also indicated that the more works a buyer owns, and the longer the time from first purchase, the more likely they are to buy additional works, concluding that buyers' motivations are linked to their experience of buying.

This corroborates McIntyre et al's (2004:20) findings regarding the experience of buying being a factor, with buyers becoming more self-directed and increasingly trusting of their own judgement as they gain experience. Zwaans (2010:57) suggests art demand theory can be extended by incorporating the frequency of buying art and the level of involvement of the art buyer and both these factors are thus included in my study.

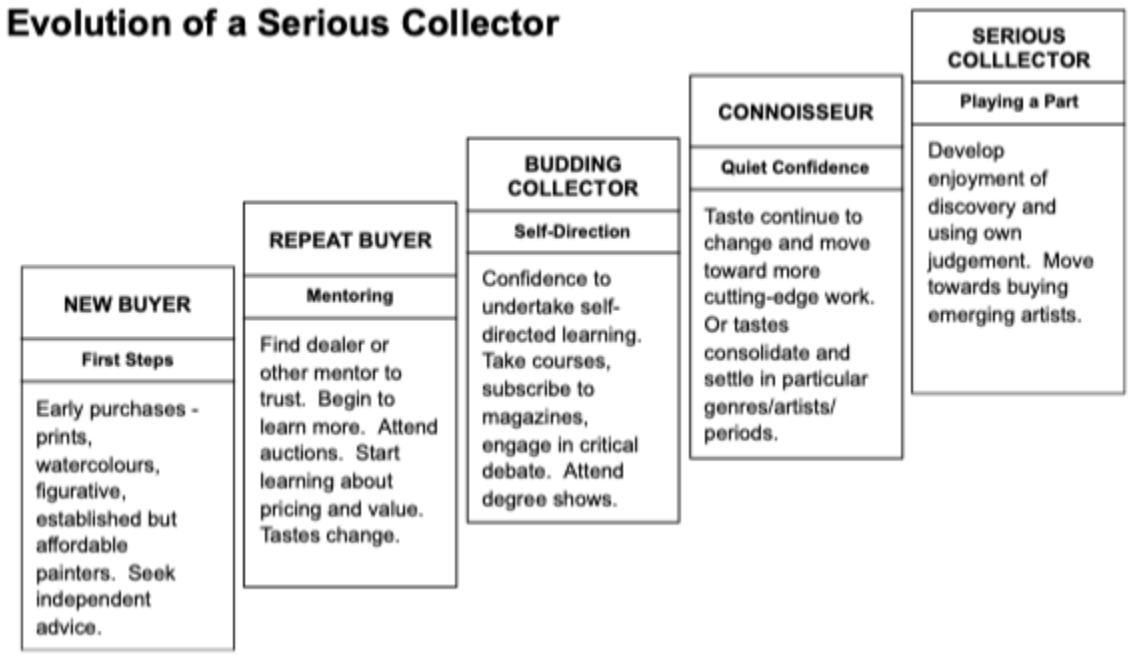


Figure 4 Evolution of a Serious Collector: Macintyre, et al (2004)

Cobie Labuscagne (2010), in her doctoral thesis *Reflections on the Contemporary Moment in South Africa: Art Publics, Art Money, and Art Objects at Joburg Art Fair, 2008–2009,* used the establishment of the first African art fair to investigate and gain *"*understanding of recent changes in the social and economic landscape of South Africa in this contemporary moment" (2010:2). Labuscagne references Bourdieu's *Distinction* (1988) to "understand art buying and its relation to the social and economic". Labuscagne's in-depth interviews with four collectors and observation of many others whilst doing fieldwork and participant observation at the Joburg Art Fair concludes that "what is (even more) striking, are the ways in which contemporary South Africa has created publics that do not fit easily into Bourdieu's model" (2010). Labuscagne is referring to Bourdieu's finding that buyers of art do so, in some part, to acquire cultural capital, which in turn adds to their social capital. In Labuscagne's

research the collectors often had deeply personal connections with the art work and the subject matter in it and were less concerned about the social capital Bourdieu suggested buying artwork would bring. It could be questioned whether art buying in South Africa does bring with it social capital and, if so, whether this applies to most buyers.

In her study focusing on the first two editions of the Joburg Art Fair 2007 and 2008, Labuscagne (2010:92-93) identified the aim of the fair as to draw a more diverse social field than the traditional South African art public to the fair. This was in part due to a perception (or understanding) that due to the political uncertainty within the country, individuals within the traditional (white) art public were considering emigrating and thus the art market was shrinking. The first fair positioned art as a luxury good with investment properties focusing on the buying rather than the appreciating of art and perhaps passing judgement on the perceived conspicuous consumption of the emerging black middle class (2010:99). In the fair's sponsorship document, they proposed that by offering a "friendly, empowering buying environment for those South Africans of all cultures who had benefited from the country's economic growth and more equitable distribution of wealth" they would create "a new class of art buyer" (2010:95). Responding to a journalist who reported on the first edition and who Labuscagne felt was "othering" the non-art public by implying that the fair merely provides a different place for them to be social, Labuscagne argued that it is precisely through this socialising that new art publics are made (2010:113).

An artwork says Velthuis (2011:35), is an extreme case of a heterogeneous[17] good where the supply to the market is inelastic. There might be some substitutability where a buyer can get a work by the same artist, but the supply is also limited upon the death of the artist. There is a lack of liquidity in the market as to sell an artwork one must find a buyer who wants that specific work. An artwork is also indivisible although a recent addition to the market is fractional ownership of artworks as reported by Adam (2018). As bemoaned by art market researchers (Corrigall,

[17] definition: diverse in character or content.

2019:7, Velthuis, 2005:2) there is a lack of transparency regarding the prices paid, and who bought what works, which leads to information asymmetry, as the seller generally has more knowledge and information than the buyer and this allows for fraud and deceit (Velthuis, 2011:36). While there is evidence of some fraud within the secondary art market, with fakes being presented for sale, the reputable auction houses have and do identify these and reject them (Wood, 2019). In my study interviewees reported on perceived deception or exploitation of information asymmetry within the primary market. Velthuis's 2005 research into the "*Architecture of the Art Market*" set out to interpret Bourdieu's analyses of the field of cultural production within the current contemporary art market and is reflecting on Bourdieu's concept that cultural and economic dominance comes through an actor's position within a field and gives them power over those with less cultural capital allowing for exploitation. My research will uncover perceptions of this phenomenon within the South African art market.

Addressing the status and understanding of the role of cultural goods in the broader economy Throsby (1994) argues that, despite the production and consumption of the arts predating most other economic phenomena (here I believe Throsby is referring to prehistoric humans dancing and making cave drawings), the field has been largely neglected by economic theorists. To understand the cultural economy, cultural capital, as defined by Bourdieu, must be added to the three traditional forms of capital concerning economists – physical, human and natural[18] (Throsby,1999:1).

Bourdieu's concept of cultural capital is the education, knowledge, skills and behaviours that a person can accumulate over time and tap into to demonstrate their cultural competence and social status. Tied into this is the formation of taste and its influence on consumer patterns which Throsby (1994:3) argues is essential to an economic model that explains demand for the arts. Taste, being a subjective factor, will be discussed in the second section of this literature review.

In his economic analysis, Throsby (1994:4) distinguishes between two motivations for buying art: aesthetic and financial. Velthuis (2011:34) adds a third, namely,

[18] Physical - manmade goods, human -labour and intellect and natural - environmental resources

social. These three factors relate to the concepts of cultural, economic and social capital in Bourdieu's Theory of Practice. Velthuis (2005:27) asserts that all capital, physical, human, natural, cultural and social while distinct from one another can be directly or indirectly translated into economic capital. He also argues that while players in the avant-garde field of the artworld present their activity as non-commercial this denial is an essential duality and duplicity of the field. Players within the field know the rules as a result of their habitus, they know that art is both a commodity and a symbolic object. They understand that the accumulation of symbolic capital in the short run is a sound economic strategy in the long run, leading to an increase in the economic value of the symbolic good. They are socioeconomic maximisers where non-economic forms of capital disguise the root of economic capital (Velthuis, 2005).

The first factor articulated by Throsby and Velthuis is that of aesthetic consumption where the content of the work is of primary concern: is the artwork aesthetically pleasing, does it provide a decorative function and/or is the subject matter of profound interest to the buyer? Aesthetic value is a store of cultural capital. Adding to this, Bourdieu uses the degree of usefulness or functionality of a creative object to "rank" cultural goods by their cultural capital value from the least functional, therefore most valuable, to the most functional and thereby least valuable.

The second factor is art as an asset, providing a financial service through its potential to retain value as a store of wealth or grow in economic value as an investment. Financial value is a store of economic value and capital. The art-world looks askance at art buyers who are driven purely by financial or economic motives. Dealers will often not sell work to buyers who have previously bought an artwork and sold it again very quickly or "flipped it" to gain a quick profit. One dealer interviewed by Velthuis (2005:1) said that he would only sell work to people who expected to "grow from it spiritually" and that once an artwork reached the secondary or auction market it lost its "emotional value" and degrades to "capital". But, as mentioned earlier in this review, Velthuis points out that art dealers are socioeconomic maximisers where non-economic forms of capital disguise the root of economic capital.

My study looks at these two motivating factors, as both distinct and intersecting, exploring the possibility that, for many buyers, cultural and economic value are equally important in the transaction.

The third factor as identified by Velthuis (2011:34) relates to Bourdieu's (2010:24) concepts of social capital as articulated in one's networks or status in social groups. There is social value to acquiring art as it might contribute to the acquisition of social capital. Social value could be "buying a ticket" into a social world, gaining express membership to a higher "class" or increasing one's status as the purchase indicates one has disposable wealth and is part of an elite group (Velthuis: 2011:34).

For some investors, only the financial factor is at play as the work is purchased and sent straight to safe storage. For museums, the aesthetic factor is primary, especially since the deaccessioning or sale of a work by a museum is considered illegitimate by many.

Throsby (1994:26) highlights the "serious constraint imposed on research in cultural economics by the lack of comprehensive statistics on the arts industry and its subsectors". My study partially addresses this by providing statistical data, albeit limited to a small convenience sample, on South African buyers.

5.2.2 Credence Goods, Validation and Subscription

Credence goods[19] such as artworks are those goods for which value cannot be objectively and individually determined. The market therefore relies on credible experts to ascribe value (Velthuis, 2011:37). With this description Velthuis dovetails succinctly into Bourdieu's *Theory of Cultural Production*. Changes in tastes and fashions of both the market and the experts can change the price of art. The value of art is thus 'socially constructed' and based on the production of belief. Cultural experts - in the case of the contemporary art-world this is a network of art world

[19] The belief in or acceptance of something as true.

professionals such as curators, academics and critics etc. - possess symbolic capital that can be converted to economic capital by their endorsing the work and thereby increasing the artworks subscription and therefore the works economic value or price (Bourdieu, 1993:77). Subscription validates an artwork as legitimate fine art and is done by endorsement of an artist's work through exhibitions, critical appraisal and private and public purchases. *"The value of an artist's work increases in direct proportion to the subscription it attracts and sustains*" (McIntyre et al, 2004:4).

A South African Art Critics Index (ACI) was created by Olckers, Kannemeyer and Stevenson (2015) as a proxy for measuring the cultural value of an artist. Their data was collected by counting how often an artist or their work was referenced in 13 notable art survey books about South African art. They contend that characteristics of an artist's work that lead to their inclusion in these books by art historians or critics are the same characteristics that contribute to cultural value. This is a direct application of the subscription theory of valuation of artworks. They argue that the reason the art market is irregular is because the work is valued both economically and culturally and while economic value is easy to measure, cultural value or the value of the idea embodied in the artwork is far more difficult to quantify.

Within the context of my study it is compelling to note that only one of the 13 books, published between 1960 and 2011, from which Olckers, Kannemeyer and Stevenson drew their data, had a black author or editor. I see this as potential evidence of the western European cultural dominance and the dominance of white "voices" in the field of art in South Africa.

There is limited institutional influence across the African continent with a lack of art institutions such as museums, foundations and biennales such that the commercial galleries have become the primary "validating" sector for the (South) African art market (Corrigall, 2019:17). This would imply that the commercial art galleries in South Africa, as the constructors of cultural capital for an individual artist, in turn construct the country's art history (Kidd, 2016:63). The lack of local institutions of validation leads to the western art ecosystem casting a shadow over the African ecosystem as the galleries and artists look to the western art centres for validation. The galleries' focus on the western canon of legitimate art filters down through the South African art ecosystem and shapes the structures and hierarchies of the

galleries. Kabov (2015) argues that the search for western validation has the impact of imposing western tastes and values onto the local market.

To create the perceived rarity of the work, and thereby increase the value of artwork, commercial gallerists often restrict access to purchase to notable individual private collectors or institutions whose “subscription” is perceived to add value to the work. In this way, new buyers are not only discouraged but actively excluded from the market. “Some dealers resist selling to people they do not know and do not see developing new buyers as a worthwhile investment of time and effort” (McIntyre et al, 2004:22). Attributing a “nobler” reason for this behaviour is that galleries and artists recognise that artworks need to be bought and sold but worry that money in the art market can overpower meaning or cultural capital. Instead of resisting the market they use strategies of valorising passionate collectors and diminishing purely financial investors (Coslor, 2010:18). Both these positions articulate the exclusive and exclusionary nature of the art-world which limits the access of new collectors entering the market which is essential for the sustainability of any market. My study investigates whether buyers and black buyers in particular are aware of and experience these exclusionary practices.

As discussed in my overview of the art-markets, globalisation of the market has expanded cultural and economic inequality favoring the privilege of a small social group. As huge amounts of disposable income, created by the global economy, has accumulated in the hands of a small group of business people and entrepreneurs, the sale of contemporary art has grown. The traditional gatekeepers and validators, critics and museums appear to have been replaced by mega collectors and market driven prices, which now establish the importance of art.

The global art market is driven by the tastes of the approximately 95 000 super-rich individuals (each worth over US$30 million). Crane (2009:338) contends that mega collectors represent eighty percent of all recent buyers. These individuals finance commercial galleries, invest in the production of art by leading artists and build museums to house their private collections. The phenomenon of building museums to house private collections is evident in South Africa, albeit that the established institutions are mandated by their philanthropic funders to play educational and public service roles as well. Future research could investigate the role of these

institutions in increasing value and prices for artworks by artists held in their collections. Critical questions to be researched include whether building a private museum with a public interface increase the value of the founding collection.

Until the 1990s financial value was less important than consecration by major museums, and artists were motivated by aesthetic goals and peer assessment. Art was a collective activity based on shared commitment to the artistic conventions of the time with artists developing a consensus about the work they were producing. Artists moving outside of this convention where considered avant-garde (Crane, 2009:333). Artists worked for many years before achieving economic success which often alluded them in their lifetime. Most members of the public at the time did not understand the aesthetic conventions underlying the work.

Since the 1990s, however, it is the commercial galleries at art fairs and auction houses that establish the public value of artworks. It is the market and not the museums that are defining contemporary art. Museums now follow the trends rather than establish them (Crane, 2009:336). Private museums, however, are often established by mega collectors with their own curatorial vision and agenda and serve to validate the work in their own private collections rather than serve the public good of endorsing independently consecrated artworks. Velthuis (2017: 1:04:25) disagrees with Crane and, while acknowledging that the mega collectors have huge economic power, he believes that these collectors are paying close attention to the “old world” institutions and are still looking for legitimisation from the traditional institutions of validation. He does not believe that the mega collectors have become the taste makers but rather follow the lead of the institutions.

Understanding who is validating art in South Africa is important to my study as it speaks to the power dynamics between those who have inside knowledge of the art-world - art dealers, galleries and established collectors - and new entrants to the art market who have not yet acquired such knowledge.

The market and financial criteria for legitimising art has not only endorsed Western tastes it has had the added impact on the survival of “difficult” work in favor of less demanding and sensational work (Crane, 2009:332). Avant-garde art has declined and the boundaries between high art (defined by Bourdieu as a restricted field of production) and popular culture (large scale cultural production) have merged. With

the cultural “power” being held by the dominant wealthy elite in the market who have no desire or motive to relinquish their position it is difficult for alternative cultural capitals to gain a foothold. In my study I will use the data to understand the impact this cultural dominance has on the behaviour of South African buyers.

The Contemporary Art Marketplace Model (Fig 5, McIntyre et al 2004) maps the segments of the art market by means of factors of degree of critical engagement with critical debate, style of the artwork and destination (meaning local, regional, national or international). In this model subscription happens in the avant-garde and recognised art categories. As work becomes more innovative it garners higher levels of critical engagement. If emerging art, usually by younger, early to mid-career artists, is able to gain broader reach in the market extending beyond local and national boundaries into the international market, it enters the avant-garde or what Bourdieu calls “high art”. Bourdieu distinguishes between traditional art which can be appreciated by the untrained eye and includes portraiture, landscape and still life and is consumed by those with economic capital, and avant-garde art which requires intellectual engagement. Avant-garde art carries more cultural capital than traditional art which is more accessible and does not require validation or consecration by experts (Bourdieu, 1993:108). Velthuis adds to this distinction by identifying differences in the way avant-garde and traditional dealers represent their business and market the artworks. Avant-garde dealers or galleries are found outside of mainstream retail shopping areas and represent themselves closer to museum exhibition spaces to appeal to “worthy collectors” whereas traditional dealers or galleries can be found in “high streets” and shopping malls and pride themselves on providing accessible spaces to engage the general public (Velthuis, 2005:22).

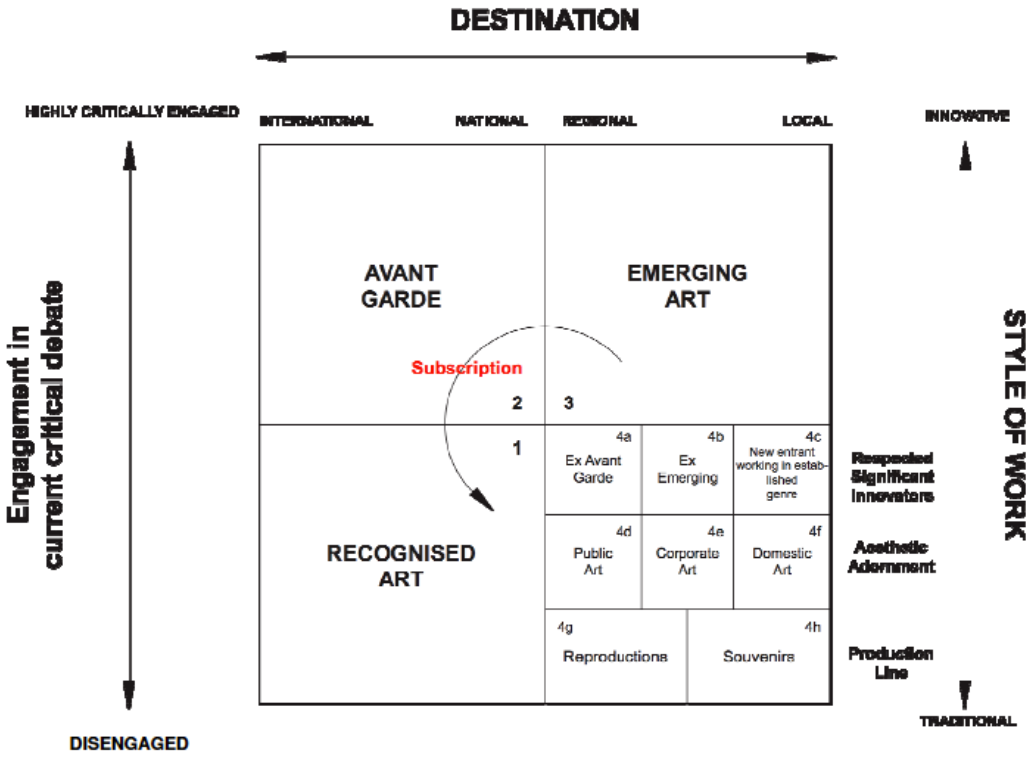


Figure 5: Contemporary Art Marketplace Model. McIntyre, et al (2004)

It is important to note Crane's (2008:342) argument however that suggests that *The Contemporary Art Market Place Model* is out of date as notions of "Avant-garde" within the contemporary art world have changed and the boundaries between high and popular culture have merged. The successful global artist now has similar characteristics to an entrepreneur, not concerned with producing a unique artwork but establishing themselves as a brand. Examples of "brand name" artists are Damien Hirst having a "factory" of assistants produce a series of 500 paintings of dots to his specifications and Japanese artist Murakami including an actual shop of handbags he designed for Louis Vuitton in an exhibition (Crane, 2009:344).

If the market can only be understood via the cultural institutions (museums, critics, academics) that generate credibility and belief (Velthuis, 2011:37), South Africa has very few curatorial voices independent of the market, having a limited number of art museums or independent art critics to assist buyers with information placing cultural dominance and taste making in the hands of the commercial galleries and large

private collectors. My research incorporates validation and consecration as it affects power dynamics within the South African art-world.

5.2.3 Conclusion

The structure and nature of the market for contemporary art is that the heterogeneous “commodity” or artwork has social, cultural, symbolic and economic value which the market translates into forms of social, cultural, symbolic and economic capital

The nature of an artwork as a credence good requiring validation and the complex and opaque manner in which this happens empowers those who are immersed in and have experience of the field of the art world. This requirement to understand these complex “rules” of the field can be a barrier to expanding the base of buyers within a market. My study investigates these factors within the context of the local South African market.

5.3 Subjective Factors

5.3.1 The formation of taste

In his seminal book *Distinction* (1979), based on empirical research in 1960s France, Bourdieu introduced key concepts for understanding societies’ engagement with arts and culture. Bourdieu argued that taste and the possession of cultural capital is central to the stratification of society and determines the way individuals consume cultural goods.

An individual’s consumption of cultural goods will be determined by cultural capital, as it is embodied in forms of knowledge and ability that, like economic capital, are not natural gifts but rather are acquired via distinct social mechanisms and manifested in distinct tastes and competencies. An individual’s home environment, level of education and place in the occupational class structure, will position them on the socially divisive class continuum. The “noble” habitus one is born or educated into, by increased economic capital, will endow one with knowledge of high culture and the correct way of appreciating it, that in turn define the tastes of that class (Bourdieu, 1979; 170-172).

Institutional cultural and symbolic producers, including established artists (usually represented by the elite galleries), curators and gallerists within the avant-garde art market want to keep their practices pure and untainted by the commercialisation and standardisation of the dominant and economically powerful group - or as Kabov (2015) would argue “new money”. The self-confident economically powerful group are, however, assured of their position and therefore extend their aesthetic appreciation and tastes onto goods not yet institutionally prescribed (Lizardo and Skiles: 2016). This conflict between institutional validation and validation by market forces is amplified in the present global art market (Kabov, 2015). In addition to disagreeing that market forces and mega collectors are now establishing the canon of taste, Velthuis (2013:28:45) also argues that globalisation of the art-world is happening for a very small group of artists in the minority of the art-world. He stresses the importance and dominance of local markets for local artists in all countries he has conducted research in. Referencing China, Velthuis (2013:55:39) warns against being cynical about local tastes as many artworks, although reaching stellar prices in the local Chinese markets do not align with western notions of “good taste”, some of the buyers acquire knowledge about contemporary art and go on to enter the international art-market and develop tastes more aligned to the western canon. Velthuis has not (yet) studied the South African art-market. Analysis of the data from my study will shed light on the impact of the conflict between dominant western tastes and domestic tastes on the South African art-market.

Wallace (2017:2) contends that the dominance of white middle-class cultural tradition needs to be replaced by increased cultural flexibility and a need to value diversity. It is important for a democracy that both dominant and non-dominant forms of culture are included, especially when the non-dominant forms of culture belong to the majority of the population as in South Africa. Power shifts in social fields that might be valuable in the dominant field might not be valuable in the non-dominant. The instruments of cultural capital including cultural cues, social styles, schemes of expression, manners of speaking, acquired bodies of knowledge differ between classes but also between races within classes (Wallace, 2016:39).

The appreciation of fine arts in the 19th century was an attempt by highbrow Anglo Saxons to distinguish themselves from lowbrow immigrants (Peterson and Kern, 2014:900). In recent years, however high-status individuals, far from being

snobbishly exclusive in their taste, have become eclectic or omnivorous. Peterson and Kern's study used music and musical genres as a point of reference however the conclusions are a useful reference for the fine art world. They distinguish the way the culture is consumed as the key differentiator unrelated to the type of culture, whereas for Bourdieu, both the type of culture and the way it is consumed was important. Both Peterson et al and Bourdieu propose however that unreflective consumption of culture for personal enjoyment is lowbrow compared with that of intellectual appreciation. My study investigates buyers' motives and includes the intellectual amongst other factors.

Bourdieu wrote in the mid to late 20th century when a very different set of dynamics influenced the art world. Museums, public institutions, academics, critics and curators were the "tastemakers", validating what was agreed to be legitimate art. Challenging "avant-garde" art was exhibited and endorsed prior to reaching the market. Physical exhibitions were key to making art visible to the public. In the 21st century the art-world has been globalised. Kabov (2016) argues that market forces, including the power of commercial galleries and mega wealthy collectors, now validate tastes and the internet makes access to all forms of culture available at the "click of a mouse". Research by Lizardo and Skiles (2016:9) found that only consuming high art to the exclusion of popular culture indicates one is a new entrant into the cultural elite (via schooling or employment) and thus less confident in tastes. Those born into the cultural elite, they argue, are more confidently omnivorous. Bourdieu's concept of distinction and the exclusivity of "highbrow" tastes does not include the idea of the cultural omnivore however within the contemporary art world taste making remains exclusive whether a "cultural elite" is consuming only "legitimate" art or a plethora of cultural products both legitimate and popular. For the purposes of my research, Bourdieu's concepts of class distinction and the formation of taste remain relevant.

Peterson and Kern (2014:905) argue that rising standards of living, access to education and exposure to the arts across a plethora of media has devalued the arts as "markers of exclusion" which could be seen as a positive move for society towards broader inclusion. The historical trend towards greater tolerance of those holding different values to one's own has made exclusion or discrimination against others different to oneself socially unacceptable. The same demand for inclusion has

occurred in the art world which places *"*positive value on seeking new and ever more exotic modes of expression*"* (Peterson and Kern, 2014:905). This assertion of inclusion by the art-world contradicts MacIntyre et al (2004:22) who identified the major factors excluding new entrants into the art market as being the art-world practice of not engaging with new buyers that effectively excludes people and leads to their feeling inferior and being fearful of feeling intellectually and financially inadequate. My study investigates whether the South African art-world is perceived by new or potential new entrants as exclusive or inclusive.

Corrigall (2019:4) contends that the addition of over 50 new contemporary arts platforms between 2008 and 2018 in South Africa, with 70% of them being commercial galleries, could be seen to indicate that contemporary art is gaining cultural centrality. This she argues, can be attributed to the South African scenario being one where market process drives the prestige of contemporary art as high culture.

5.3.2 Habitus and cleft habitus

> "Habitus is embodied history – not just the individual's personal history but their family's as well – the impact of the past on the present "(Diane Reay in Taylor, 2019).

In this section I will examine papers by *The Next Generation* of Bourdieusian scholars and other recent papers that use his tools to decolonise knowledge production reflecting on their own experiences and habitus. Bourdieu's concepts are being used in "new and innovative ways to challenge the status quo and the taken for granted" (Diane Reay, in Thatcher, J. et al. (Eds). 2016: fly sheet). Historically, readers of Bourdieu have concluded that habitus, being impact of past on present, is fixed and not able to change over time but recent scholars have provided space for habitus to shift, its creation seen as a process that unfolds over time linked to experiences of different social settings (Flisback, 2014:63). This shift in application or view of habitus acknowledges the stable society Bourdieu was researching and embraces the application of this concept to a changing and transforming world.

For Bourdieu (2010) cultural capital is not just institutionalised education objectified in museum visits but it also embodies our degree of confidence of entitlement, a feeling at ease in the world or a feeling of dis-ease and anxiety about the context one

finds oneself in. Actors within a field need to know how to encode and decode the rules of the field. Habitus enables us to make distinctions between different cultural goods and these distinctions are predictable across class lines.

A feeling of disjuncture between one's habitus and the field one enters denotes a "cleft" in one's habitus. I believe this concept to be particularly relevant in the contemporary art-world in South Africa which has historically been the domain of, and dominated by, white owned galleries and white collectors. While this phenomenon of European domination is not unique to South Africa it does present a particular problem to our art-market, given the uniqueness of the South African demographic.

It will be useful at this point to get some insight into the "habitus" of the so called "black middle class" in South Africa to understand the application of Bourdieu's concept within this study. Ngoma (2016:171) writes that during Apartheid state-led expansion of the middle class created opportunities to privileged English and Afrikaans white South Africans, post liberation the focus has been on BEE[20] and EE[21] facilitation of the black middle class. When asked to explain their understanding of "middle class" and whether they were part of it, respondents to Ngoma's survey, who were black professionals, entrepreneurs and management, gave multiple descriptions. Race however, emerged as an explanatory factor that "served to resist, contradict and disrupt middle class location and belonging". This, asserts Ngoma, served as an indication that the Black middle class has struggled to reconcile its class with racial identity. Ngoma continues that "high levels of racial inequality maintain the black middle class' racial alliances over class alliances" (2016:176).

Khunou (2013) contends that

> "Entities such as research institutions and marketing consultants now produce new labels. An important part of the resistance to such labels is that people do

[20] Black Economic Empowerment

[21] Employment Equity

not want to identify with a label or category defined outside themselves and outside their social world*"*

Referencing advertising and marketing researchers, Ngoma (2016:186) warned against the reductive focus on the black middle class as only of commercial and consumptive interest reducing "this important group to purchasing power".

Both Khunou (2013) and Ngoma (2016:178) wrote about the prevalence of high levels of debt within the group attributing this to what is colloquially known as "Black Tax" as they have higher levels of community and family responsibilities and obligations than their white counterparts.

Ndinga-Kanga, in a 2019 article in the Daily Maverick titled *Towards an understanding of 'black tax' and the black missing middle,* wrote:

> *"*Rather than pathologise 'black tax', we need to politicise it by understanding its historical origins in a racialised Apartheid South Africa that socially engineered black poverty. SA's continued capitalist system has created structures that perpetuate poverty and make the need for black tax a reality. Black tax does the real work of income redistribution in the country*".*

Ndinga-Kanga's study found that 58% of respondents sent money home, primarily to siblings and parents. This is an indication that middle- or high-income households are connected to working-class households and "sending money home" was important in the "context of hunger and poverty" (Ndinga-Kanga, 2019).

The respondents in Ngoma's 2016 study saw themselves as black and did not want to claim a "class" as it is seen as variable and open to change or as Ndinga-Kanga (2019) puts it "lacking socioeconomic resilience" and "the financial cushion that enables risk taking and protection against shocks". Ngoma's study also concluded that many in the group carried with them working class practices having an identity defined historically and "reinforced by the continued dominance of white capital" (2016:176).

Swarns, in her 2002 article in *The New York Times* on the growth of the black elite, reported some of the (black) respondents saying that they were lonely living in traditionally white neighbourhoods and others felt guilty enjoying their newfound

wealth while family and friends had been left behind in poverty. Another reported that he felt the “cars and cell phones and holidays” were a celebration of achievement and a message of hope saying “look this is possible”.

Being perceived as upwardly mobile within the black community de Coninck (2018:169) argues is tied to “questions of economic morality and racial loyalty”. Apartheid’s interracial separation was so dominant that it hid intra-racial socioeconomic differences which have become “more apparent with economic liberation”.

Added to the burden of black tax, Nieftagodien and van der Berg (2007:2) hypothesise that “part of the racial differences in consumption behaviour could be attributed to the historical deficit in assets that even more affluent blacks experienced, given South Africa’s racial past”. This references a lack of generational wealth within the black community across all classes and Nieftagodien and van der Berg (2007:10) conclude that a stage of asset accumulation would precede a stage of middle class consumption.

What Khunou (2013), Ngoma (2016), Ndinga-Kanga (2019) and Swarns (2002) are all articulating is a state of cleft-habitus within the groups they studied and their analysis reveals that there is a multidimensionality to black middle or elite classes that neither fit or desire to be neatly labelled and categorised. Labuscagne’s (2010) study indicates that the art world in South Africa is trying to do exactly that, label and categorise in its attempt to understand and reach the growing group of potential buyers which could lead to their alienation from the field.

My study will respond to this.

Social mobility can lead to “cleft habitus” where a person’s habitus encounters and confronts a field that is both new and contradictory, a confrontation that is often painful (Ingrams and Abrahams, 2016:140).

> “It is likely that those who are ‘in their right place’ in the social world can abandon and entrust themselves more, and more completely to their dispositions (that is the ‘ease’ of the well-born) than those who occupy awkward positions, such as the parvenus and the declasses; and the latter are more likely to bring to consciousness that which, for others is taken for

> granted, because they are forced to keep watch on themselves and consciously correct the 'first movements' of a habitus that generates inappropriate or misplaced behaviours" (Bourdieu in Thatcher et al, 2000:145).

For a person who has gained wealth but is from humble origins to be forced to consciously monitor their ways of being to ensure they fit into "high society" or the field they find themselves in can be both difficult and uncomfortable. Given the choice they could choose to not participate in the field rather than endure the discomfort (Ingram and Abrahams, 2019:148). Given that the majority of South African were politically and economically excluded by Apartheid and there is a growing elite class whose backgrounds are often ones of economic poverty, I will investigate this rejection response to "cleft habitus" as it might inform our understanding of low levels of black buyer participation in the art-market in South Africa.

One of the white art professionals interviewed in Labuscagne's study (2010:101), who came to the art world late in life, articulated the potential of cleft habitus in the art world. She expressed frustration that those who have studied art do not understand that, for intelligent members of the public, being confronted by something they don't understand is an unpleasant experience. What the art fair did not address was the need to be informed in order to be comfortable engaging with art. The fair was focusing on converting the black moneyed class to buying art as the luxury brands had done. Labuscagne found the commonly held view across her interviews was a stereotypical one of the black elites being more interested in visible luxury goods and the assumption that buying prestige cars and buying art were mutually exclusive (2010:110). I would argue that, as Carroll (2004) asserts; "the new generation of black achievers have emerged to claim what used to be the preserve of whites - good jobs, fancy cars, lawn sprinklers and foreign holidays" and that it is presumptive and possibly racist to assume that white art collectors do not also own fancy cars and luxury branded goods.

The lack of research into black cultural capital has led to the perception that whiteness and cultural capital are synonymous. Wallace (2017:3) contends that white European aesthetics are attributed an enduring and universal premium as the

dominant markers of cultural capital thus reinforcing the wider historical system of ethno-racial domination. New notions of cultural capital sensitive to ethno-racial differences can change the approach and unhinge whiteness, and its reproduction of white privilege[22], as the dominant cultural capital.

How Britain is dealing with its expanding cultural diversity could provide clues as to how the South African art world can navigate its own need to be more culturally inclusive. Navigation of diversity in the UK is enhanced by "multicultural capital"; the understanding of diverse cultures. In the context of the South African art world this would mean placing value on black African culture and its meaningful role in creating a new dominant cultural capital. Wallace (2017:15) argues that it is important for a democracy that both dominant and non-dominant forms of culture are included as legitimate by individuals and institutions. When applied to the Eurocentric contemporary art world in South Africa this would mean placing African cultural validation onto the consecrator's agendas and finding a balance between domestic and international tastes for art.

> "People assume I am poor because I am black, makes me wonder if I belong here" (Middle class black student at an elite university)". Wallace (2017:13).

Erasmus reports that as people in South Africa grew up and lived under Apartheid this has meant black and white South Africans had very different racialised experiences thus they find themselves "both estranged and antagonistic towards one another". (2005:14). What Erasmus is reporting on is differences in habitus by race.

Flisback (2014:53) describes that for an "outsider" entering a dominant field, self-reflection can lead to limited change in their habitus; but an individual caught in the contradiction could find expectations regarding required knowledge and modes of behaviour or disposition within a field cause self-doubt and insecurity. When feeling

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[22] *White privilege* is a term used to describe unearned rights and benefits afforded white people in Western society because of the colour of their skin. https://www.dictionary.com/e/pop-culture/white-privilege/ [accessed 10 March 2020]

marginalised, the individual can respond to the dominant group by rejecting their values and establishing a counter culture or they can believe it is their own deficit that has caused this feeling thus succumbing to symbolic violence having internalised the views of the dominant. If, however they have a "cleft habitus" they can accept the rules but with a creative, critical and reflexive eye and respond by expanding their own cultural capital, moving to an alternative field or creating a new field. My study will look for evidence of how black buyers are responding to the Eurocentric dominance of the art-world and whether the concept of cleft habitus can be applied to understand the evidence.

Wolf (2007:109) proposes that Bourdieu's methodological devices are not entirely sufficient for the conceptualisation of a "translational field" which takes into account operations between fields. I agree with Wolf's argument that Bourdieu's theory of cultural production will be enhanced using Bhabha's theorem of the Third Space which Wolf defines as "an area of transition which cannot be seen as a static identity producing entity but a process" (2007:113).

Cleft habitus can be understood in relation to Bhabha's (1994:38) concept of hybrid identities that are carried by people who introduce revolutionary change, having found a "Third Space" that is neither the habitus of the dominant nor the dominated but a new habitus entirely. An international culture based on hybridity instead of diversity of cultures or the exoticism of multiculturalism could be established. Bhabha argues that the Third Space destroys the way cultural knowledge is ordinarily revealed ensuring that the meanings and symbols of culture can be read anew, appropriated, displaced and translated without the hierarchical claims of cultural purity or originality. By exploring the Third Space, polarising politics can be avoided and a new version of the individual revealed (Bhabha in Rutherford, 1990:213).

It is interesting to note that Wolf (2007:118) supports Labuscagne's position that new publics are made by social interactions when she articulates that the Third Space can be described as where:

> *"*a mediation space is built up through new connections and in which agents are subject to continuous re interpretations, questioning existing orders and allowing for the possibility of multiple contextualisation's. Social interactions function in the process of mediating between cultures*"* Wolf (2007:118).

Kalua (2009:25) writes that “by grounding his version of postcolonialism in liminality or the third space, Bhabha is able to contextualise the vexed nature of the post-colonial condition and provide a counterpoint to identity issues”.

My study questions whether validation and subscription and those with the power to do so could be a mechanism that contributes to the field of contemporary art in South Africa being at odds with the habitus of the broader black South African community leading to their reluctance to participate. Contemporary Bourdieusian theory could provide insights into this phenomenon through the introduction of the concept of cleft-habitus and Bhabha’s theory of the Third Space which allows us to analyse the motivations of existing black buyers in relation to their levels of confidence or comfort within the contemporary art world. The solutions to growing the South African buyer base could be found in the three possible responses proposed by the literature. An individual can have a cleft habitus and respond by expanding their own knowledge and cultural capital related to the field, moving to a new field (or not entering a field as it exists) or creating a new field entirely, a Third Space.

5.3.3 Symbolic Violence

Another of Bourdieu’s central ideas is that of symbolic domination (Burawoy, 2012:14). As his ideas are western and French, their applicability to other contexts has been questioned. Bourdieu worked in stable societies; his work says little about social change, transformation, resistance and revolution which are key to understanding South African class structures. His theories and concepts, however, can be useful tools to investigate our society. A South African scholar, Von Holdt (2012:25) argues that South Africa’s social history has been ruptured by Apartheid and the end of Apartheid has caused the disruption of the certainty of a master narrative that requires fresh engagement with Bourdieu’s theory. Here Bhabha is also useful as he sheds light on the impact of colonialism and the establishment of Western cultural dominance.

Bhabha (2090:218) writes that in the 18th and 19th century while “Western modernity” was establishing master narratives of state, citizens, art, science and this major cultural discourse came to define the “enlightenment” of western society. At the same time another history of the west as a despotic power with colonial possessions

was being written which creates ideological tension with the birth of democracy and modernity in the west. The history of colonialism is the counter-history to the traditional history of the west.

Burawoy (2012:15) states that “symbolic domination is rooted in habitus”. For the dominant class their familiarity with high culture is deemed a personal attribute rather than a privileged aspect of their class. As soon as dominant cultural capital is misrecognised as truth it exerts symbolic violence. The dominant class’s belief that theirs is the only legitimate culture and thus all other culture is deficit, combined with their ability to inflict this position onto the subaltern and have the dominated culture believe the dominant culture’s “truth”, is the symbolic violence that leads to the dominated groups belief in their own perceived deficits.

Bhabha (2019:219) contends that a post-colonial perspective insists that cultural and political identity is constructed through a process of “othering” and that “the time for assimilating minorities to holistic and organic notions of cultural value has passed”. I believe that my review of the contemporary art world in South Africa suggests that we have not passed this notion.

Erasmus (2005:9) argues that despite there no longer being exclusionary legislation based on race, race is still a site of exclusion and division in South Africa. With the emergence of the black middle class one can no longer assume that “blackness means disadvantage”. However historically white institutions, and here I would like to suggest the art world in South Africa is such an institution, “assume black people will assimilate into the existing dominant culture of the institution which leads to difficult to recognise and often unintentional exclusionary practices based on race (2005:15)”.

European cultural domination and symbolic violence is not a uniquely South African phenomenon in the arts. Researching in the United Kingdom, Brook, O'Brien & Taylor (2017:3) found that the creative and cultural sectors are marked by significant exclusions of people of working-class origins with a compounded impact on women and ethnic minorities. People with wealthy backgrounds dominate and the white men, who are the highest paid in the sector, believe that it is hard work and talent that lead to success and are unlikely to recognise the exclusionary factors of class,

gender and race. They believe the sector is a meritocracy and so don't believe anything needs to change (2017:3).

Brook et al (2017:3) found that the creative sector is the most liberal and left wing and its members are proponents of social mobility and inclusion. However, participants in the creative industries have narrow social networks, choosing to socialise predominantly with others within the same field which suggests "social closure" in the sector. My observations of the art world suggest that this is also true for professionals in the South African creative sector. Social reproduction is at play in the field, no matter how talented or hardworking a person of a different race, gender or class from the people hiring or promoting them is, they will struggle to advance. The people working within the sector do not represent the nation's demographics and show taste patterns substantially different to the rest of the population. Hiring in the sector can be a form of "cultural matching" excluding those who do not show the same tastes as the specific cultural group (Brook et al, 2017:33). This ties directly to Bourdieu's concept of dominant cultures having the power to reproduce themselves and retain their hold on dominance. This, I believe, is at play generally in South Africa and more acutely in the art world and something my research will investigate.

The dominated class does not have the sociological knowledge to unmask domination and the dominator has no desire to unmask. Class domination is reproduced by means of symbolic violence that assures an assumed submission to domination that is incorporated into bodies and language. The only way to understand the dominant field is through instruments of knowledge of the dominator thus the dominated consents to the domination, and so falls prey to symbolic violence. Domination becomes natural and invisible (Bourdieu, 1992:168).

Bourdieu's "imperialism of reason" argues that in colonies and post colonies where legitimate culture mostly means western culture, 'native' cultures are seen as backward and there is an "abstract universalism" where the non-western world is found lacking or deficient.

Von Holdt (2012:91) argues that the Black Consciousness movement spoke to this directly and contended inferiority fostered by racism needs to be overcome as symbolic violence has had enormous force in the colonies. Von Holdt goes on to contrast the violence we see in South Africa's, which is rough, physical and visible

with Bourdieu's symbolic violence, which is gentle, imperceptible and invisible to its victims.

Cawood reported in her 2014 article *The 'Recalcitrant Other': The Rhetorical Identity and Struggle of Nelson Mandela* that her paper:

> "explores the complexity of Mandela's rhetorical identity as the Recalcitrant Other and his rhetorical struggle as informed by contesting influences such as his ancestral birth right, cultural upbringing, British mission education, and exposure to a racially constructed hegemonic order. By subversively drawing on his anglophile tendencies, he defied both Empire and the Apartheid regime, but without denying his cultural roots".

As Moloantoa (2016) reports:

> "The entire enterprise of mission schools stood at an ambiguous, and conflicted crossroads. It was partisan to the colonial project, but yet educated students who were opposed to colonialism. It shied away from political involvement, and yet sanctioned the ideals of equality through its religious teachings".

Bantu education subordinated learners to white domination but was resisted by the likes of Mandela who used the knowledge he acquired but found a Third Space of resistance that didn't opt into the teaching and domination but did lean towards the western canon of ideas.

Masoero (2014:48) wrote that within the art world the dominance of European culture has been challenged by African curators, notably Okwui Enwezor in his journal *NKA* and Simon Njami in *Revue Noire*. They recognised the authenticity of contemporary art practices in Africa and worked to rewrite the existing history. Their intellectual engagement produced an alternative re-appropriated discourse on contemporary African art.

Colonial acts of collection of historical African art exerts symbolic violence by attributing "discovery" to the colonisers, displaying "authorless craft" and negating African modernity. African artistic trends, while explaining Africa's own culture are influenced by the encounters African artists and collectors have with the west, white

collectors and curators, providing a western-centered market with a new exotic symbolic good (Masoero, 2014:24).

Masoero (2014:48) describes Enwezor and Njami as deconstructing the symbolic violence produced by the western establishment of the “otherness” of African art. They constructed an alternative modernity, a different story about the discourse between western and global south cultures endorsing Bhabha’s hybridity and restoring dignity to cultural and ethnic differences

An example of this shift towards constructing an alternative modernity is the story of Dak’Art Biennale in Senegal. For the first eight years of the biennale (1992 to 2000) it focused on attracting international collectors. In 2000 the biennale decided to take an African focus. It selected African and diaspora artists but were criticised for still having an international selection committee that needed to appeal to their colleagues as opposed to the Senegalese public. In 2004 Ivorian curator, Yacouba Konaté, focused on appealing to the tastes of the Senegalese public with less diaspora artists and younger, relatively unknown Senegalese artists. While selection was based on aesthetic value the ambiguous criterion of “African essence” was removed from the previous list of criteria (Masoero 2014:58).

5.3.4 Conclusion

The purpose of this literature review was to reference writers and theorists who have studied relevant aspects of both the art world and the South African context within which my study is positioned.

The nature of an artwork and its position in the field, with its social, symbolic, cultural and economic properties, is a complex and multifaceted one. As a heterogenous, as opposed to mass produced good, Throsby (1994) reports that it does not fit neatly into conventional economic models of demand and supply. The market for artworks is marked by its opacity which results in information asymmetry between seller and buyer that is amplified when the buyer lacks knowledge and experience in the field. Bourdieu’s forms of capital; social, symbolic, cultural and economic, intersect, overlap and transform as an artwork makes its way into and through the field.

As a credence good with no objective means of valuation an artwork requires consecration and validation to for its worth to be established. Here I found Bourdieu’s

concepts required the additional reflexive approach of contemporary Bourdieusian scholars to be applied to address both the South African context and the current global art market.

At the time Bourdieu wrote his seminal work *Distinction,* art was not yet viewed as an asset class and globalisation and the worldwide web were not significant factors in the field. For Bourdieu (2010), tastes were established by the cultural elite of the day and the consumption of artwork, when done purely for aesthetic and intellectual purposes as opposed to decorative or functional, would be a marker of one's elevated position in the stable class hierarchy of the time. Notions of social reproduction and cultural imperialism pervade his writing with cultural dominance and power resting in the hands of capital endowed European institutions of validation and taste making. Current global shifts towards revising histories of imperialism and colonisation, as reported by Bhabha (1990), bring these established systems of validation into question. Recognition of other cultures as valid and legitimate is a central issue that requires open debate with alternative views and interpretations of cultural value introduced and considered. Wallace (2017), Reay (2016), Corrigal (2019), Kabov (2015) and Olkers et al (2015), amongst others, have all made contributions to this discussion.

The financial power of the dominant western elite in the global art market has led to a perception that they are able to drive the tastes and consecration of "legitimate" art by virtue of their sheer economic power. Velthuis (2013) does not believe they have this power but contemporary Bourdieusian scholars report on the dominance of western cultural capital across most fields and are investigating ways that this can be addressed, and an equitable balance be found between dominant and minority cultural capital. Masoero (2014) and Kabov (2015) both emphasise the insidious nature of the dominance of western cultural capital over African cultural capital within the art world with Kabov (2015) arguing that the search for western validation has the impact of imposing western tastes and values onto local markets.

The subjective factors impacting the field, and an artworks movement in and through it, are possibly the most interesting for the purposes of my study as they impact directly on the motivations and behaviour of buyers of art. Bourdieu's concept of habitus is central to understanding the ways in which an agent might operate within

the field of contemporary art. A person's social, cultural and economic history and accumulated capitals of all forms combine to establish their disposition when engaging within a field. Some theorists have interpreted Bourdieu's concept of habitus to be one of a fixed and unchangeable disposition but contemporary theorists, including Flisback (2014), have re-interpreted a person's habitus as something that continues to develop through a lifetime and can shift and change as their circumstances and environment or the fields they engage with shift. This is particularly observable in times of social upheaval or rupture as seen in Apartheid policies and their ending in 1994.

Bourdieu introduced the concept of cleft habitus, where an actor's disposition or habitus is in conflict with the rules and positions of the field, they find themselves in. Being in a position of cleft-habitus is an uncomfortable or even painful one to find oneself in. Whilst Bourdieu contends that there is not much to be done in a situation of cleft-habitus, Flisback (2014) suggests that the person has a number of possible responses. The first is to reject the field and exit it, thus choosing to not engage with the discomfort of the field at all. The second response is to reflexively and creatively adapt one's habitus by actively acquiring additional knowledge, social networks or other capitals that the field requires. The third response is introduced by a seminal scholar to the literature, Homi Bhabha (1994) with his concept of hybridity and the Third Space.

Bhabha's theory allows for the clash or intersection of two conflicting positions to find a new or liminal space that is neither of the two contributing positions. It is a space for negotiation where something new can be articulated without hierarchy.

The so called emerging black middle class in South Africa has been reported by Kalua (2009) and Wolf (2007) as being in positions of cleft habitus as they moved rapidly out of Apartheid, with is concomitant economic disempowerment, into situations of relative affluence. Often viewed as a homogenous mass to sell to, they do not fit neatly into "market segments" and labelled categories and classifications of marketers. The black middle class reject labelling by anyone outside of themselves and take ownership of the diversity within their ranks. They are aware of the stereotyping of their newly acquired affluence as flashy and visible consumption, but the historical prevention of wealth accumulation often finds their financial position

precarious. The black middle class carry with them guilt about those members of their historical community who have been left in poverty and the burden of supporting immediate and extended family who remain economically disempowered. *Black tax* is a prevalent phenomenon. This leads them to self-identify as black over any class classification.

Symbolic violence, a concept introduced by Bourdieu, is an insidious and often undetected abuse inflicted by dominant classes on subalterns. Von Holdt (2018) reports on the inferiority fostered by racism that needs to be overcome as symbolic violence has had enormous force in the colonies. Dominant cultures which are not necessarily in the majority, as seen in South Africa where western culture dominates African despite black Africans being in the majority, impose their tastes and values onto others and this position as accepted by all as “truth”. Masoero (2014) reports West African art practitioners Njami and Enwezor as having actively resisted this position within the art world.

As there has not been a focused study of the art world in South Africa from the perspective of buyers of art, my study will add to the literature by providing this viewpoint. Bourdieu and contemporary interpreters of his work, in conjunction with Bhabha’s theories of post-colonial society, will provide the framework within which I will report on the data I have accumulated.

The art world is a complex web of opaque and subjective factors where one’s position in society can either empower or enable an actor or disempower and exclude. Using Bourdieu’s tools to establish who the dominant tastemakers are and where the power in the dynamics of the field lies, we can then use the next generation of Bourdieusian scholar’s application of Bourdieu’s theories in contemporary society and Bhabha’s notions of hybridity and the Third Space to strategise new ways of deconstructing and rebuilding a more inclusive and equitable art world in South Africa.

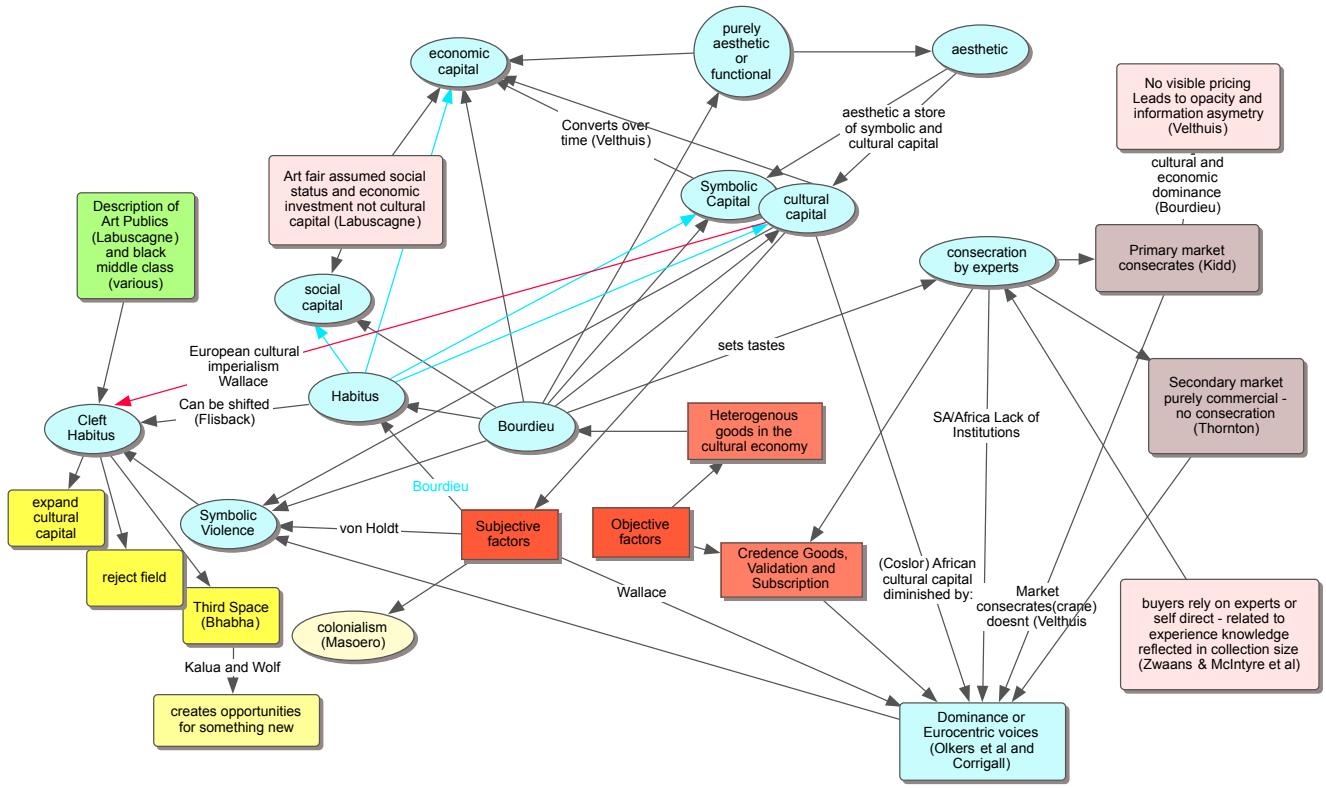


Figure 6 Intersection of concepts and theories in the literature

6 Methodology

I structured the previous chapter incorporating a Bourdieusian approach of understanding the objective factors and then the symbolic or subjective factors when reviewing the literature. My methodology has the same approach thus requiring both quantitative data to measure objective demographic factors and levels of prevalence of ascription to motivations for buying art and qualitative data to explain the resulting quantitative data and the symbolic and subjective meanings associated with these outcomes. Qualitative interview data from black collectors enabled insights into the

quantitative data that I was unable to glean reflexively as a white person. The art market functions within the social, economic and symbolic realms and the motives of buyers of contemporary art in South Africa are thus driven by factors across these areas.

6.1 Research paradigm

Cameron (2009) reports of the "paradigm wars" of the 1980s that "purists" argued that quantitative and qualitative research methods should never be mixed, "situationalists" would allow for certain research methods to be used in specific situations and "pragmatists" did not believe in the dichotomy between quantitative and qualitative research methods. Pragmatists believe that both methods can be used in a single study. Cameron contends that "like the mythology of the Phoenix, mixed methods research has arisen out of the paradigm wars to become the third methodological movement" My research is placed within the pragmatic mixed methods research paradigm.

Creswell (2016: 00:6:20) defines the mixed methods approach as "collecting and analysing both quantitative and qualitative data in response to a research question and then integrating the two types of data, mixing them". He argues that many people think they are taking a mixed method approach as they collect both types of data but to be true mixed methods research the two types of data need to be analysed together to see how they intersect or combine to give greater insight than either could give on their own. The concerns that have been raised about this method is that it requires two kinds of data collection, analysing both kinds of data and then integrating the two in a systematic manner. Thus, it requires more time and effort. The benefit however, as I have found in this study, is greater insight into the research question.

In my study, I have used mixed methods research and taken a deductive approach to test existing art market and social theory as it may or may not apply to the South African market and buyers of contemporary visual art. Existing theory suggests that consumer behaviour, particularly in the art world, is driven by factors that are particular to human society and therefore a strategy is required to understand the subjective meaning of what could be an essentially social action. Labuscagne (2010) utilised this approach for her research based on Bourdieu's (1988) *Distinction,*

articulating the act of buying art to be both a social and economic activity. Her empirical data was, however, only from a survey of visitors to the art fair that was the subject of her study. Only 7% of those surveyed bought art at the fair and almost all the interviews conducted were with art world professionals and not with buyers or collectors of art. My study extends Labuscagne's by providing a view of the art world from the perspective of the buyer.

Value in the art world is socially constructed via consensus from experts. While economists can explain the market for other commodities by simple rules of supply and demand, the factors driving demand for art are nuanced and often opaque. To understand the nuances of the many factors motivating individual buyers to buy art qualitative research is required. Quantitative research generated data that enabled me to identify additional questions that required further qualitative investigation and therefore a mixed method research paradigm was best suited to my aims.

I specifically identified black buyers to interview for this research, to understand why the factors that drive the demand within the black African community differ from those within the white community. The results of my study could influence the existing sales paradigms enabling the South African art market to develop inclusive practices that broadens the buyer base in South Africa.

Bourdieu does not focus on race, ethnicity and/or gender – all of which are factors in the South African context. However contemporary Bourdieusian scholars use Bourdieu's concepts of habitus, symbolic violence and dominant and minority capital as tools when addressing these factors. I have used these concepts, in addition to Bhabha's theorem of the Third Space, to interpret my quantitative data and frame the qualitative research interviews I conducted after analysing the survey results.

6.2 Research Design

Creswell (2003) identifies four decisions to be made when deciding on a mixed methods research design: the sequence of implementation of data collection, the method that takes priority during data collection and analysis, what is involved at the integration stage of one's findings and the theoretical perspective used. This matches my process, however, I had initially thought that the quantitative data from my survey would form the bulk of my analysis and take priority. The quantitative

data, however, while being limited by my sample size, did generate additional questions that required me to do further interviews in order to be able to explain the results. The qualitative interviews with black buyers, after analysing the survey data, proved to provide significant substance to my study.

The sequences of this study's data collection began with in-depth interviews with black buyers in South Africa to establish their factors driving demand. I then used these factors and referenced Zwaans' (2015) survey and that of MacIntyre et al (2014), in addition to questions related to the literature, to draw up a quantitative survey to establish the relevance and pervasiveness of each factor identified. After analysing the empirical data, I did additional interviews with black art buyers and professionals to better understand the data from their perspective and to corroborate my findings.



Table 6-1 Sequential Exploratory Mixed Methods Process of my study.

As with Zwaans' (2015) survey I began this study's survey with a series of basic demographic questions; but unlike Zwaans I included a question regarding the respondents' race.

This self-completion survey was distributed broadly in an attempt to attain statistically significant quantitative data. The quantitative data has been analysed and the results cross referenced with the initial qualitative data to integrate the two types of data with my own experience and knowledge as a professional in the art world.

Whilst the low number of black respondents made statistical significance in my empirical data generally not possible, the data did reveal differing behaviour between

black and white buyers. This led me to interview a number of black buyers and art world professionals after my initial analysis of the empirical data in order to get their interpretations of the results. As I am working within a Bourdieusian framework that requires reflexivity on the part of the researcher and since I am conscious of my "whiteness" within this field, it was essential that I ask black people to reflect on my results and give their insights into the empirical data. These interviews were based on the empirical data analysis and generated rich narratives and anecdotes that added significantly to the findings of my study. This Exploratory Sequential Mixed Methods Research Design (Creswell 2013) has thus been the method best suited to the aim of the study as the intersection of the quantitative and qualitative data enables a rich data set beyond that which a single method could have generated.

6.3 Data Collection

As I surmised the growth in the contemporary art market in South Africa will come from the emerging black middle class and elite, I wanted to ensure my survey included questions relating to the motivations of young black buyers. I identified five existing young black buyers, from across my network of art world contacts. I then conducted in depth qualitative interviews, asking when, what, why, where and how they buy contemporary visual art, what they believe are the barriers for new buyers entering the market and how they suggest these barriers are overcome. The data from this initial research was analysed in conjunction with past surveys to establish themes and trends to inform the construction of the quantitative survey.

The survey was based on the results of my interviews and the survey used by Zwaans (2015) and gleaned from McIntyre et al's (2004)[23] results in addition to questions informed by the literature (7.3.2) I used a self-completion survey distributed online and shared across the internet and via email to as broad an

[23] I requested a copy of the survey but was not able to get it.

audience as possible. The survey was created online as a Google form and released and distributed on the 20th October 2018 until the 10th December 2018.

My participation in the art world has put me in a strong position to access a broad and deep data base of buyers for both the qualitative and quantitative research. This data base included all the buyers from the limited-edition print pop up shops I have held over the last 5 years and the audience for the South African pavilion at the Venice Biennale in 2017. The quantitative survey was distributed via links within my social media platforms and arts industry network and via email links to my database who were requested to forward the information and participation request to their broader network. I selected relevant organisations such as ArtAfrica magazine, The Artists' Press printmaking studio, 10 and 5 online arts magazine, Blq magazine amongst others who could reach additional respondents. to assist me with the survey distribution.

The survey results have been analysed statistically to establish trends and themes. The dominant themes and trends were used to explore the motivations of the South African Art buyer with additional interviews with black buyers to explain phenomena reported by the quantitative data that required reflective interpretation that I was unable to provide. The quantitative and qualitative data was analysed within the framework of international art market theory to establish the results of the question posed by this research.

6.3.1 Initial interview questions:

The initial interviews took the form of a conversation and in addition to basic demographic information of name, age, race, included the following questions as prompts for the discussion:

1. What is your employment status and field of work?
2. What is the source of your interest in the art world – family, education, other?
3. What sort of visual art are you interested in and buy and why?
4. Are your friends, family or colleagues interested in and do they buy visual art?
5. What is your impression and opinion of the South African visual art environment?

6. What are your other key hobbies or interests?

The interview included further conversational questions leading from the interviewee's responses which pointed me towards the possibility that race would feature as a differentiator in motives to buy art or buyer behaviours.

6.3.2 Survey Questions:

Survey questions were drawn up as follows:

Basic demographic information: age, gender, race and home language.

The question regarding race was to enable me to analyse my results using contemporary Bourdieusian theory that explores minority and majority cultural capital, symbolic violence and cleft habitus. This question has allowed me to distinguish between motivating factors and behaviours as they may vary between races.

I requested information about nationality and country of residence in order to eliminate non-South Africans who do not live in South Africa as they were outside of the scope of my study.

I included questions regarding place of residence, being city, suburb, township, rural and other but have not found the information useful in my analysis.

For the question regarding industry and occupation I allowed respondents to write their own responses. In hindsight I should have made it a multiple-choice question in order to be able to analyse the responses empirically.

Level of education (question 8) was included as it relates to Bourdieu's concept of class distinctions being related to relative levels of education.

Question 9 in the survey split respondents between those who have and haven't bought art and directed the respondents to different questions based on whether they had or hadn't bought contemporary art.

Those who responded that they had bought contemporary art where then asked:

How they developed their interest in art (Question 10) given a selection of 6 options to select multiple answers if needed. This relates to Hagg's (2010) report for the DAC regarding attendance of museums and art in public spaces, which respondents had studied art or been exposed to art at their workplace or childhood home environment. This information is also relevant to the habitus of the respondent.

The next question (11) was regarding annual income as it relates to class and disposable income for luxury goods. In hindsight household income might have been a better or additional relevant question as annual income does not give any indication of wealth, particularly generational wealth or allow currently unemployed but wealthy individuals to respond accurately.

Question 12 was a multiple-choice question that asked how many works of art the respondent owned and relates to Zwaans (2015) and Macintyre et al (2004) research to establish collection size as it may influence buyer motivations and behaviour.

Question 13 regarding the nationalities of the artists whose work they had bought speaks to Bourdieu's concept of cultural and symbolic capital and Kabov and Velthuis's assertions of the necessity of a strong local market for local artists. In the survey I included six regions 1. South Africa 2. Rest of Africa 3. USA/Canada 4. Europe 5. Latin America 6. Australasia. However in my final analysis, I combined regions 3 to 6 into a single region I named "rest of the world".

Questions 14,15 and 16 asked when the buyer had last bought, how many works they bought and what they spent. The "last bought" date established that over 99% of buyers have bought since 2000, rendering the "since 1988" aspect of the previous title of this study moot.

The next series of questions were to establish the motivations of buyers. Respondents were asked to rank their responses on a 5-point scale with 1 being "not at all important" and 5 being "extremely important". In my analysis I combined the top 3 responses into a single category I titled "important".

The following questions are linked to cultural capital factors motivating buyers

17a. The work challenges my intellect

17b. I want to support the artist

17c. The work expresses something about who I am

17i. The work is an important work in art history / South African history

Economic capital and financial motives are embodied in:

17d. The work is a good financial investment

Non-intellectual engagement with the work and thus less “highbrow “ tastes are revealed by question 17e: The work will match the decor of the room I wish to hang it in.

Indicative of confidence in one’s own taste:

18e. A gut feeling... I just like it...

Indicative of a lack of confidence and a social motive for buying:

18f. Other people admire the work

Labuscagne (2010) found some South African buyers to be more interested in a personal connection to the work and the following questions would reveal the prevalence of this factor:

17h. The work reminds me of a specific place, event, person

17c. The work expresses something about who I am

17b. I want to support the artist

To determine the social capital one would attract by owning the work:

18f. Other people admire the work

Questions 19 and 20 asked about range and most paid for a work of art with simple multiple choice answers.

Question 21 asked about sales channels the respondent has used and multiple answers were possible. This was used to establish the role, for the buyer, of the intermediary in the process of purchasing art, to investigate whether Macintyre et al’s (2004) UK findings of intermediaries being barriers to entry applies in the South African market, and to establish whether my study would corroborate BASA’s

(2015b) findings that South Africans under the age of 30 are avoiding certain channels.

Sources of information prior to purchasing was question 22 and speaks to levels of knowledge and confidence in buyers. Respondents could choose multiples from nine options which included “I don’t prepare” as a measure of confidence and “friends” as an indication of possible social influence.

Mediums bought, question 23, was asked in order to correlate South African results to Macintyre et al’s (2004) UK research about mediums bought as a collector develops their collection over time.

Respondents were then asked to describe one of their favourite art purchases, including artist, title, medium, size, price and why they bought it. Their responses make for interesting reading and I have included some of these comments as they contribute to the discussion and reveal nuances to the survey questions that rank motives.

Question 25 regarding respondent’s leisure time and other interests was to gain insight into whether buyers are omnivores or univores as proposed by Bourdieu in *Distinction* and investigated by Peterson and Kern (1996).

Non-buyers were asked why they have never bought art and whether they would consider buying art in the future. This would establish the prevalence of economic constrains or whether other factors where preventing respondents entering the art market.

All respondents were asked to rank their financial priorities which I hoped would reveal the prevalence of black tax as a factor but this question proved to be unclear in its structure and did not generate useful data.

All respondents were given the opportunity to add additional information that they believed to be useful to my study and I have incorporated some of these comments into my analysis where they contribute to the discussion.

6.3.3 Post survey interview questions:

My data revealed differences between the factors motivating black and white buyers. Being a white person myself and therefore unable to explain the data reflexively I

chose to conduct an additional series of interviews with black collectors and art professionals. I revealed to them some of the results from the empirical survey and requested their interpretations of the results.

These interviews have added significantly to my understanding of the empirical data and often elicited anecdotes and insights which have allowed for a far more nuanced interpretation of the quantitative data than I would have been able to deduce on my own.

6.4 Sample Description

Being a convenience sample, I did not know how the sample was going to be constructed. However, I was aware that due to the structure of the contemporary art world and the demographics of my network that getting a significant sample of black buyers would be a challenge.

The online survey was created in Google forms and distributed via email and social media. There were 27 questions for respondents who had bought art in the past and 13 questions for those who had never bought art. In total, 597 people completed the survey. Seven respondents were excluded because they were neither South African nor did they live in South Africa. South Africans living abroad and foreign nationals living in South Africa were included. Possibly reflecting the demographics of the art-buying world, white respondents (73.7%) outnumbered Black (18.8%) and other race respondents (7.5%). Due to the small sample size of the “other race” respondents, identifying as coloured (n = 14), Asian (n = 4), mixed race (n = 9), or other (n = 17), they were removed from the sample. Of the remaining 546 respondents, 77.8% reported having bought art and 22.2% reported having not bought art.

Most of the respondents spoke English; the remaining respondents were evenly split between Afrikaans and one of the other nine official South African languages. In addition, the sample was biased towards female respondents, with women outnumbering men at a rate of about 2:1. This bias could reflect my network or women’s greater willingness to respond to the survey rather than a real gender difference in art buyers in South Africa. Analysis of the data, however, did not show any significant differences in responses to questions of motives or behaviour between male and female buyers.

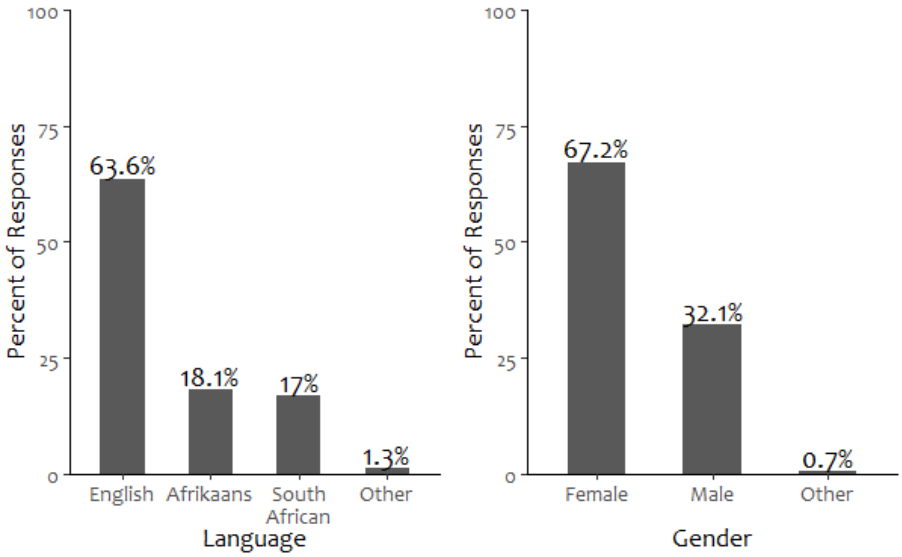


Table 6-2 language and gender of respondents

Respondents represented a broad range of ages and were relatively highly educated, with the majority reporting a tertiary education.

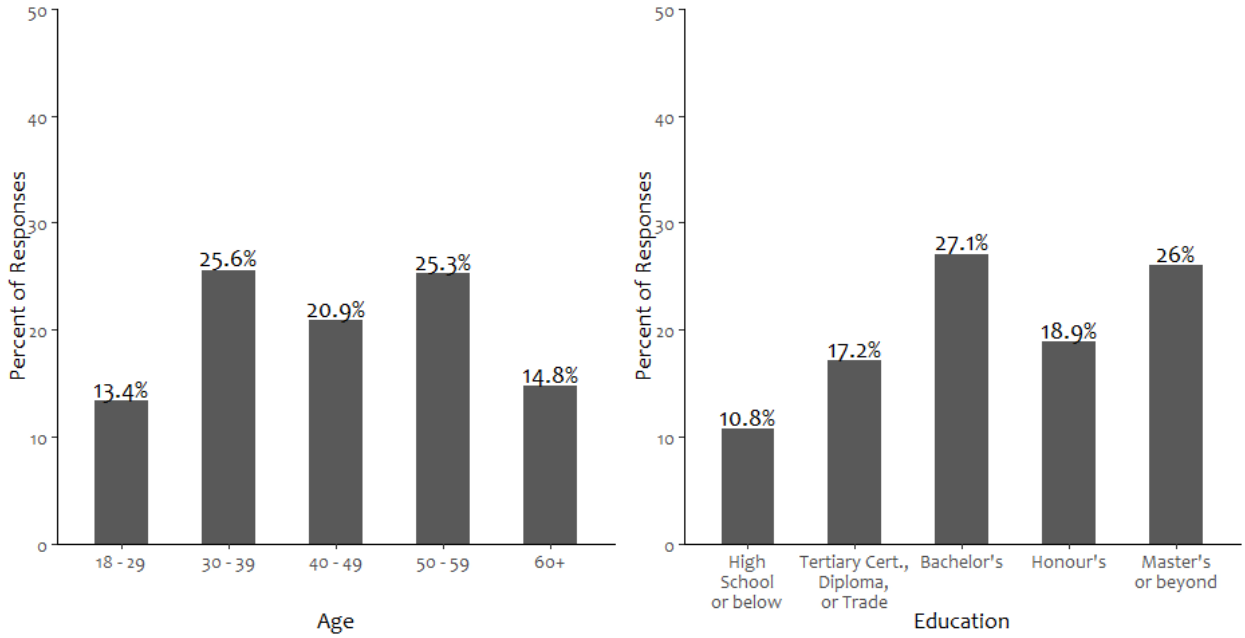


Table 6-3 Age and education of respondents

6.5 Limitations

In hindsight I asked too many questions and was therefore unable to include all the survey data in my analysis. It remains available for a fellow researcher to analyse it for different findings.

A more important limitation is the small sample of black buyers which disallowed me from yielding statistically significant empirical results.

6.6 Ethical Considerations

The participants in my study were all adults and the nature of the study was such that I anticipated most to have a tertiary education and be economically privileged. The interview candidates were fully informed as to the nature of my research and signed consent forms choosing whether they agreed to being identified in the report or not. I constructed and distributed the self-completion survey in a way that enabled full anonymity for the participants. Respondents were offered no remuneration or reward for completing the survey or being interviewed.

My clearance certificate R14/49 Roberts has the protocol number H18/09/26

7 A buyers perspective of the South African art market

The state of the South African art market from the buyers' perspective as revealed by the data gathered during the course of this study and viewed through the lens of the literature reviewed.

7.1 Background

Having chosen a Bourdiuesian approach to this research required reflexivity on my part as the researcher. A way to therefore introduce this study is to further explain the reasons for my interest and my own experiences that led me to conduct this research in order to extend my own knowledge and expertise in the field so that I understand the factors that could lead to the creation of sustainable livelihoods for artists in South Africa.

In 2017 I had my first opportunity to play a significant role in the art world in South Africa. Whilst I was working as new business development manager for a reality television production company, we identified and successfully tendered for the South African Pavilion at the 58th Venice Biennale Arte, viewing the project as an opportunity to extend the company's production skills into the art-world. My interest

in the art world and production skills from over two decades in the television commercial production and advertising world put us in position to attempt this project. The BEE status of the company ensured that the compliance requirements of the tender were met. In “crewing up” for the project however, we needed a team that had the experience in the art world that we did not have. The simplest route was to use the people we, or our network, knew who had done this sort of exhibition before. The production and installation team we found had done several Venice exhibitions before, so the learning curve and possibility of error was reduced. Despite our best efforts we ended up with a largely white team. We had two curators, one black and one white, and a white installation team. The representing artists for the exhibition where a white female and a black male. The core team of nine people, including the artists, was five white members and four black members. I recognised that me and my network were part of a larger problem of replicating the lack of diversity in the historical structures of the art-world.

As is seen across the arts field in South Africa the people who head up, run and manage arts organisations are all too often white while representing or managing predominantly black artists. This is not a unique problem as illustrated by the lack of diversity and representation in the creative industries in the UK. In the UK, however, over 85% of the population are white so their lack of diversity is a relatively minor problem compared to South Africa where the white population of less than 10% dominates the industry.

Wanting to address the lack of representation and attempt to partially fix the problem for future projects, our proposal to the Department of Arts and Culture included a significant mentorship programme to address some of these challenges. Regrettably the DAC removed this component of the budget. As a result, the only interns able to join us were those able to cover their own accommodation and travel costs to get there, namely two white, privileged interns. One (male) had been interning at the Peggy Guggenheim Museum in Venice so was in Venice already and another (female) was on holiday from her job as a curator at a commercial art gallery in South Africa. Both were well-travelled and understood and had experience in the field of the contemporary art world and the “rules of the game”, being familiar with and often able to recognise well known collectors, critics, curators and artists who attended the event and engage with them appropriately. Being my first international

art event as an art professional I myself was unsure of who the key figures were when attending events in Venice. Given my privilege of having been to many of the global arts capitals and major museums and exhibitions and having studied art, I knew the historical context but my recent entry in the field meant I did not know all the global contemporary artists or the inner workings of the field. I relied on the experience and knowledge of our team. I wondered at the time how other art professionals from South Africa, who have not had my privileged background of travel, would have coped in this rarefied, singular and exclusive field where what ones sees is not what is, and where there is layer upon layer of opacity and intrigue.

In addition to my experience in Venice, back home in South Africa I was running limited edition print pop-up shops with some of the print studios and setting up shop at a high school in the middle of Johannesburg's northern suburbs. The buyers were almost exclusively white, which was probably due to the location. I began looking at ways to expand the market for these events. During this time when attending gallery openings, I noticed that if the artist was white, there was a majority white crowd; and if the artist was black, there was broader representation, more like a 50/50 split between white and black. There seemed to be more diversity in the audience only when the artist was black. This phenomenon was different at openings at the black owned/managed gallery, Gallery MOMO, where the crowd was often entirely black when the opening was for a black artist.

The racial divisions in post-Apartheid South Africa appeared to me to have remained stark in the art world. I began thinking about what level of engagement with buying art was happening in the emerging black elite class and what strategies were in place in the art market to grow their participation in the art market.

While there is a tendency amongst "woke" South Africans to try and avoid talking about race, wanting to blindly move forward into our new "rainbow nation" is counterproductive as it prevents our society from truly reflecting on the past and the obstacles to progress. One of my mother's friends, a past member of Black Sash, found my questions offensive and intrusive stating in an email to me: "as a matter of principle, I refuse to answer questions re race. I belong to the human race and do not wish to categorize myself as white". This attempt at colour-blindness is a sign of white privilege, the privilege that comes from the "absence of the consequences of

racism. In order to dismantle unjust, racist structures, we must see race" (Eddo-Lodge: 2015). Erasmus (2005:22) expands on this when she says: "race is used as a defense to protect privilege by those who regard mere recognition of it as an act of racism".

One of my interviewees, NQ, remarked:

> "Race is not an awkward conversation because it's one that needs to be had as it's a reality, unless you trying to deny that colonialism and Apartheid happened".

Erasmus (2005:24) argues that racialised scripts of behaviour and reality are norms we need to recognise in order to overcome race thinking and "acknowledge complicity in the past while attempting not to repeat it". She does, however, go on to add that the opposite of "colour blindness" is equally problematic when it "determines everything we do and all we are and limits what is available to us". She clarifies this by explaining that it "assumes one can read someone's politics and belonging from the colour of their skin" (2005:24).

Within the creative sector, which Brook, O'Brian and Taylor (2017) identified as the most liberal and left-wing field in the UK, this distinction between class, culture, taste and legitimacy is profoundly evident under a skin of virtue signaling[24].

Being a country with a black majority, it could be argued that "settler whites" are still the dominant culture as globalisation is along the lines of western Europe tastes. The impact of this phenomenon could possibly be ignored in countries with a white majority, although they too are struggling with representing their countries' growing diversity (Brook, O'Brian and Taylor: 2017). In South Africa, it is impossible to overlook the lack of diversity in the art market if the sector wants to be sustainable into the future. Kabov's (2015) paper noting the rise of the Chinese market and its

[24] Virtue signaling is the action or practice of publicly expressing opinions or sentiments intended to demonstrate one's good character or the moral correctness of one's position on a particular issue.

strength based on a solid domestic market is an example that should be referenced in South Africa.

It is in the context of the need to diversify and expand the domestic market for contemporary art in South Africa to include the black majority in the buyers and collectors of contemporary art that my research is positioned.

7.2 Introduction

When approaching my survey, I particularly wanted to unearth the factors driving demand for contemporary art in this country with a view to ascertaining the reasons for the lack of diversity within the field. I have noted a lack of diversity in the "art professional" field and in commercial gallery ownership in South Africa. I believed that an investigation of buyers' motives and behaviour could reveal insights that would enable the market to diversify by identifying the barriers, beyond the purely economic, to entry for the majority of South Africa's population.

The first challenge I faced was a lack of diversity in the respondents to my survey. I had asked my social network, predominantly middle aged, educated, white suburban professionals and the diverse colleagues and connections within my previous career field of advertising, film and television in addition to my diverse network of art world participants to complete the survey and share it with their networks. Initially the response was overwhelmingly white, and a concerted effort was required on the part of myself and my black network to get a larger sample of black respondents.

My sample of buyers was 88% white (379 individuals) and 12% black (53 individuals) (Table 8-1). I removed the results of the 30 other respondents who identified as Coloured, Asian, mixed race or "other" as, being even smaller sample groups, the chances of differences in the results being observable or statistically significant was negligible. I did not add them to the "black" category and call it "people of colour" as it would have incorrectly (and possibly offensively) assumed cultural homogeneity (Lamuye:2017).

My sample was 70% female, but the statistical analysis and observation of the graphs did not show much in the way of difference between the motives or behaviours by gender.

While the skewed nature of the demographic composition of my sample possibly represents the demographic of the art market it has disallowed me to always make statistically reliable statements based on the statistics alone. However, as I have taken a mixed method approach, the statistics in combination with the other methods used - interviews with experts and buyers; comments by respondents and my own professional practice in the sector - has enabled me to comment on that which is evident from this mixed method approach (Creswell 2013).

Given the dominance of white respondents in the data set, I decided not to present an overview of all buyers as this would have merely reflected the white buyers in my data set as there was not a large enough sample of people of other races.

Art market researchers (Kidd 2016, Velthuis 2005 and Corrigall 2019, amongst others) have bemoaned the lack of sales information available, citing the available auction data as limiting. Only 19% of the respondents to my survey have bought from a live auction which confirms this limitation adding credence to the perceived opacity of the art market.

I will begin by analysing the data of non-buyers and their motives for not buying before tackling the motives of the buyers. Non-buyers are relevant to my study as they indicate the barriers to entry in the market which explains the low number of black respondents to my survey. Interviews with black buyers and art professionals expanded on what the survey data revealed.

7.3 Non-buyers

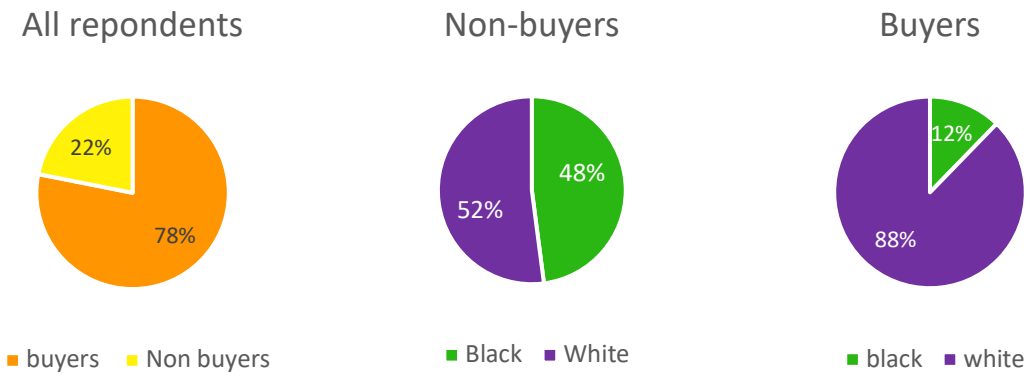


Table 7-1 Buyers vs non-buyers demographics

One hundred and twenty-one or 22% of respondents (Table 8-1) indicated that they had never bought contemporary art with an even split between the number of black and white non-buyer respondents. However, due to the small sample size of black respondents, this means 52% of the black respondents (58 individuals) were not buyers whereas only 14% (63 individuals) of white respondents are not buyers (Table 8-1). In addition to having a low response rate from black people to my survey in general, within those who did respond only 42% were buyers. The small sample of black respondents can be attributed to a lack of diverse reach of my convenience sample found online through my social networks and therefore not representative of the population at large. The large percentage of non-buyers within those who did respond however, indicates that there is a reluctance or inability of black buyers to enter the market.

Of the 78% of participants who responded that were buyers, only 53 or 12% were black whereas 379 or 88% were white (table 8-1). This skew in the data is a limitation that I hope future studies will overcome.

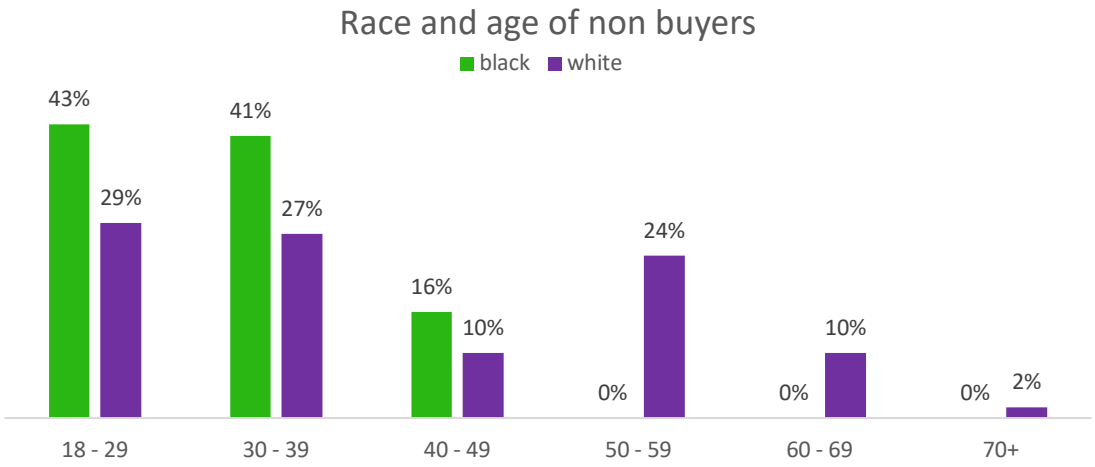


Table 7-2 Race and Age of Non-buyers

Most black non-buyers were under the age of 40 whereas the white non-buyers tended to be older. This could be an indication of the impact of “black tax” as reported by Khunou (2013) and Ndinga-Kanga (2019) and the lack of generational

wealth for younger black people who lack “socioeconomic resilience”. In an interview with collector SZ, he reported his insights into generational wealth in South Africa:

> “In South Africa generation wealth was acquired in a questionable way and over generations it becomes legitimised but again but when it is communities outside of the hegemonic communities, we exceptionalise it. So, the randlords we accept it, but these people were actually thieves who built on slave labour and were stealing the country’s wealth and then over time they consolidated it and now do different things. It’s not going to be any different in the black community, people are going to take short cuts to make the first million and the first billion and then each generation after that over time it will legitimise their wealth”. SZ.

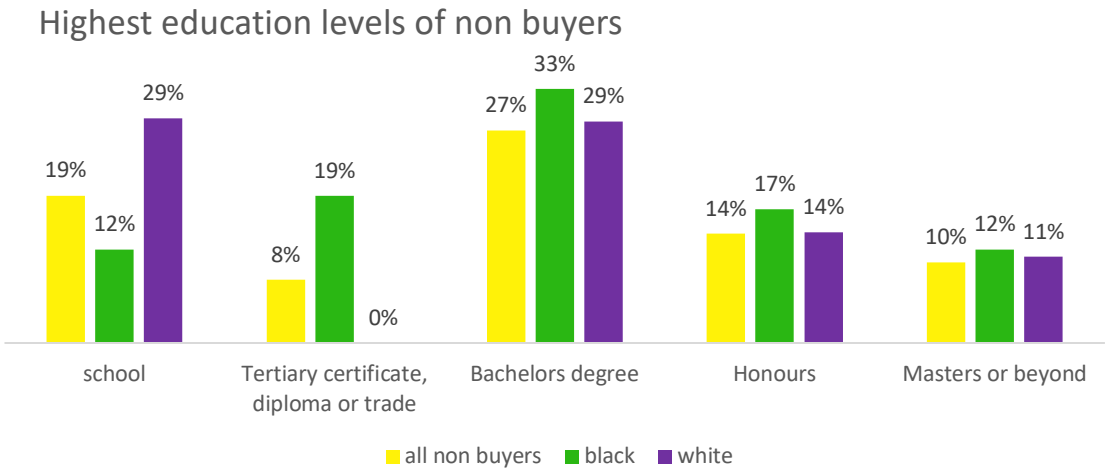


Table 7-3 Highest education level of non-Buyers

White non-buyers were less educated than buyers across all groups, with almost a third having no tertiary education, which reflects the global trend towards art buyers being more highly educated. Black non-buyers were, however, slightly more educated than white non-buyers which would indicate that for black non-buyers factors other than education are preventing them from buying art.

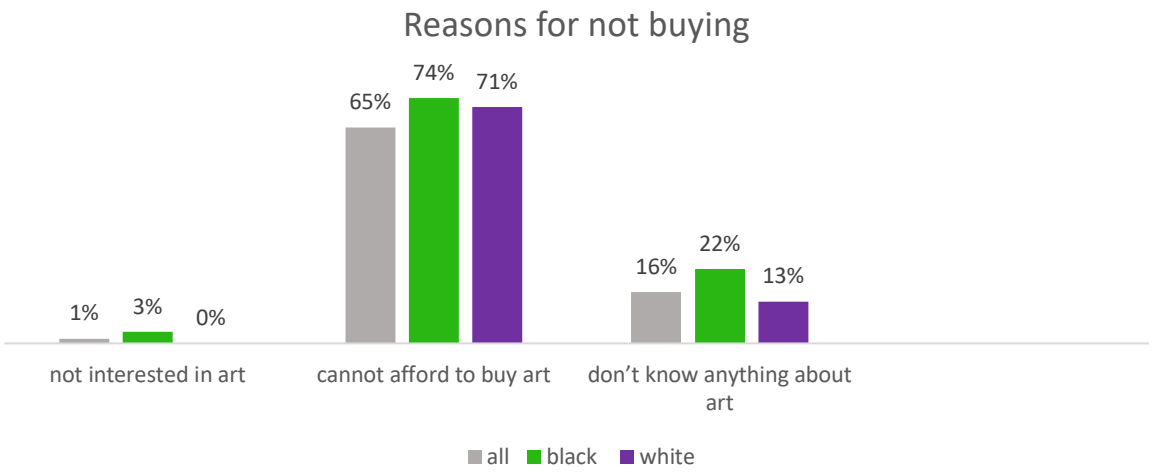


Table 7-4 Reasons for not buying

It is encouraging to note that very few respondents indicated that the reason they didn't buy art was a lack of interest. This appears to be in contradiction to the BASA (2015a) research indication a declining interest in visual arts amongst the South African population. As I expected, the biggest reason reported was being unable to afford art. Twenty two percent of black non-buyers claimed to know nothing about art which I believe to be a reflection of the lack of arts education in government schools, whereas only 13% of white respondents, who are more likely to have had art in their model C or private schools, indicated this.

There are a number of propositions by the black buyers and black art professionals I interviewed to explain the factors conspiring to exclude black buyers. The primary factors identified are not having the disposable income for luxury purchases, and not feeling like they have the required knowledge to belong in the art world as they have not been exposed to it or that the exposure they have had, has led them to be wary and cautious.

7.3.1 Economic factors

The first factor identified was economic. PK commented that black people generally earn less than white people and added to this have financial obligations to support family and extended family otherwise known as "black tax".

> "so, the last thing that is of relevance to them is buying art which is seen as the activity of the elite".

NQ corroborated this view stating

> “Black people still have bread-and-butter issues, so art is a luxury, it's the last thing on their minds”.

NQ does not feel the art world is intentionally racially exclusive but rather that black people historically could not participate economically. But she notes, optimistically, that this is changing, that there is a positive shift. NQ contends that 10 or 20 years ago art was not on the radar because parents had no roof over their heads, but now black people are becoming aware of art and if they have a bit of spare cash some will spend it on art.

PK is not optimistic stating that there is a false perception amongst potential black buyers that all works of art are too expensive. “Potential black collectors are not taking time to think through the issues of how they should be playing a role in the art economy and how they are going to find a way to support it and make a contribution”. She does not believe that there will be any substantial increase in participation in the art world by the black elite in her lifetime. PK elaborates that she feels a little unacknowledged factor at play is that South Africa is historically built on black people producing and white people consuming and this continues in, and pervades, the art world.

NQ notes that the black elite are buying luxury items and they don't see art as a wasteful thing but rather they just don't know anything about art. Their lack of participation stems from a lack of knowledge. PK expressed her concern and dismay that art is not finding traction within the black elite, and that black people in particular are not choosing to reflect on what needs to change the narrative and elevate African cultural capital. PK asked: “Why do we need the extra 60th pair of shoes.. surely we should be spending it on something meaningful, you don’t have to have the latest version of everything… *“*. The inclination of the black elite to purchase visible markers of their success such as shoes and cars was mentioned by other black art buyers and professionals interviewed. LN remarked that wearing your success in the form of luxury branded clothing elicits an immediate and direct response and gives the wearer a sense of belonging in the elite class but he believes that as people get more confident and their disposable income increases they will begin to buy art. He also reflected that the fashion industry has made an effort to get

the attention of the black buyer but the artworld hasn't because it wants to remain elitist. This opinion runs counter to the stated intention of the Joburg Art Fair's owners who in Labuscagne (2010:92-93) indicated that they wanted to attract the same audience that the luxury brands had so successfully won over. The fair did attract the audience they wanted to the event, however they seemed unable to convert the attendees into art buyers. This, Labuscagne argued, was due to the incorrect positioning of the first edition of the fair as an opportunity to invest in art without providing the requisite information to enable the audience to make informed decisions to do so. The fair did, however, expand and diversify the "art public" through the social engagement platform it provided.

Acknowledging the gross generalisation, PK asserts that black people would rather not spend money on art that hangs on the wall: they would rather spend on something that *"*sits on their bodies*"* or that they can drive, things that are more visible to the public. PK surmises that this is maybe just part of a developing economy.

BP articulates the position of younger black people who could potentially be buying art but aren't:

> " a lot of my peers are people of colour and part of their income would not go to purchasing art because they have much more tangible needs; paying for school loans, giving money to their families, black tax is such a reality. When you do have money for yourself, you feel guilty when buying a pair of sneakers or a fashion item. You definitely want to be saving money or repaying your parents but also just have a good time. Buying art would take away from that. In the moment I just want to party and have a good time. It's hard being alive first of all and it's hard being black, so let me just enjoy my life". BP.

This response by black people to their historical exclusion from the economy and their relatively recent entry into it has created the desire to make their success visible. KT objected, however, to the notion of the "black elite" in South Africa being lumped together as a homogenous mass. VS, in her role as a strategist for luxury brands, believes that although the black elite generally do express their newfound wealth more visibly, depending on personalities this expression will take different

forms and that stereotyping was not appropriate. Many she felt do display discreet, conservative traits of “old money. She segmented the black elite market into three different distinct groups. The first group she identified were the “Academics” who “flash” their success through Harvard MBAs and being alumni of elite organisations and association with high profile returned exiles with international qualifications … “we are black, we are smart and this is how we express ourselves”. The second group identified were the “flashy” who buy Bentleys and Porsches, “I've got all this money and everybody needs to know”. The third group are “cultural” people who “go to the art fairs, design fairs, who travel the world and know about wines and books”. The challenge is how to get more members of this third group into the art world as many perceive it to be “elitist, and full of white people”, resulting in their lack of interest. Everyone, however, is on a quest to express themselves (VS).

The desire to not be labelled is supported by Khunou (2013) who reported that

> “researchers and marketing people produce labels. An important part of resistance to such labels is that people do not want to identify with a label or category outside of themselves and their social world”.

7.3.2 Exclusionary practices within the art world

> *“*The artworld being intimidating and unsafe and uncomfortable space for black people”. KT*.*

PK often hears discussed how “uncomfortable potential collectors feel when they walk into white spaces*”* (referring to the classic “white cube” gallery space NOT a room full of white people*).*

> “They don’t feel welcome, they find the language that is used very exclusionary, there is very little “English” in any of the curatorial statements. I’m always complaining about it, but it’s so much more so for people who don’t feel confident enough to express themselves”. PK.

PK and KT both feel that the exclusionary practices in the art world reflect the way in which racism is pervasive in South Africa society. There are assumptions that a black person cannot afford the luxury services on offer or cannot appreciate them. KT uses the analogy of Julia Roberts in “Pretty Woman” entering an upmarket

clothing store and being treated with disdain by the salespeople. On entering a gallery “if you're black that will happen”. The opinion that black people cannot appreciate luxury services is reflected in the commonly held views of the white respondents in Labuscagne’s (2010:110) survey that she found to be a stereotypical one of the black elite being more interested in visible luxury goods and the assumption that buying prestige cars and buying art were mutually exclusive.

Another black collector I interviewed responded to my question regarding visible consumption in the following manner:

> “I’m black and have fallen into these stereotypes and may be defensive. Part of the problem at looking at change is people want to put labels and have explanations that are uniform, but life doesn’t work that way in any sphere. If you look factually who are the biggest car buyers they are white people who own the most Lamborghinis and Ferraris cos they still have the most money but you stand out as a black person when you do it, so if a black person drove past now with a Ferrari my instinct would be I should know who it is cos there aren’t that many black people who can afford it and I look at this person and my instinct is that he’s over stretched himself”. *SZ*

SZ is clearly pointing to the racial bias implicit in labelling and the resistance to this that Khunou (2013) identified. Viewed through a contemporary Bourdieusian lens this rejection of labels and need to self-identify can be seen as a resistance to the symbolic violence that is inflicted by the commonly held view of the art world professionals in Labuscagne’s (2010) study who were unable to imagine that the “new market” that the fair was trying to reach could appreciate art.

The “art language” used in the artworld is often indecipherable for all potential buyers regardless of race. In 2012 Rule and Levine published an article seeking to classify International Art English as a different language:

> “This language has everything to do with English, but it is emphatically not English. It is largely an export of the Anglophone world and can thank the global dominance of English for its current reach. But what really matters for this language—what ultimately makes it a language—is the pointed distance from English that it has always cultivated” (Rule and Levine, 2012).

Art Advisor KT has found many of the galleries she works with interested in how they can make their spaces more welcoming, not just for black people. KT thinks that both black and white clients feel intimidated when they walk into a gallery and believes that the galleries that will survive will be those that break down the old outdated model of thinking and programming of art for an ”elite highbrow”.

Luxury brand strategist and collector VS believes that the new black elite do want to get into the art world but *“the walls are very high and the doors are closed shut”.* They are observing the artworld and thinking “I’ve made my money, I’m not going to make an ass of myself now because I don’t know what’s going on there”. The solution, she feels, is to invite them into the world and provide them with the information they need to make their own decisions. The black elite are successful well-travelled global citizens, who are broadly well informed but unfortunately don’t know about the art world and find it difficult to “self-navigate”. Without guidance they will just say “stuff that, I’m going to put my money elsewhere…”

> “They are not going to make an arse of themselves… you’re a well-respected guy, you’re a CEO, you sit on seven different boards now you’re going to come into this artworld and be made to feel stupid…you’re not going to do it…“. VS.

Collector and Gallerist BP thinks that galleries and art institutions have a responsibility to be aware of the realities of people outside of the art world and invite them in. “Many people, not just people of colour, feel that these places are either pretentious or exclusionary and it's not for them”. BP.

NM views the artworld as an inclusive community but people “just don’t know that they are included”. Access to the community provides understanding and appreciation of art and had she not been part of the community she would not be buying art. The view that people *“don’t know they are included”* could be an expression of social reproduction within the field as identified by Brook et al (2004) who identified the field as being one of “social closure” so unless you know someone in the field it is very difficult to enter. Bourdieu’s concept of dominant cultures having

the power to reproduce themselves and retain their hold on dominance is reflected in NM's statement.

Black people are redefining themselves but not only as they are seen from a "white gaze" perspective but how they see themselves, says art advisor KT.

> " Many of my clients and friends were equally as disillusioned with the ANC and the corruption as everyone else because we bear the brunt of it. We pay the taxes we're on the front line in business and corporates and trying to push South Africa forward but are often viewed as only in it for money and excess and the cars and the homes and probably got there through BEE or tenderpreneurship etc.. We're fighting all these labels everywhere and I think it's quite important to understand the cultural moment. Even if it's just this black class who could potentially be black buyers in Joburg because it defines so much of who they are, how they see themselves, how they want to be seen and how many spaces don't even recognise them let alone reflect their reality. So this group increasingly don't feel seen". KT.

7.3.3 Lack of Government support for arts and culture

There is a perceived lack of government support for the sector with either public programming or education. The government, PK argues,

> "has not done enough to create an enabling, encouraging and open environment for curious people who want to apply their minds and delve into what art is all about. They don't write about it, they don't sponsor enough art, there are not enough art schools, there are not enough activations to get people who may be interested in art to participate". PK.

Historically government schools, particularly those that were part of Apartheid's Bantu Education system, had very little in the way of art education. Sidogi (2013) contends that western ideals of what constitutes art was the base of South Africa's arts education and that during Apartheid the lack of resources in black schools resulted in "overcrowded schools, poorly resourced classrooms and a generally poor or non-existent arts education for Black students" (Sidogi 2013:217). Sidogi goes on to reference the South African Department of Education stating in 1995 "that an

empowered nation will excel in all educational fields, including the arts, the case at ground level does not reflect this, especially in township and rural schools". (2013:213)

Today's black elite were unlikely to be taught art history or the technicalities around painting, performance, or sculpture, whereas PK contends people who had access to private school education or knew artists and were exposed to an artistic or creative environment would now have a feel for it. That access was afforded to the minority of the people compared to the majority that the art world is now expecting to collect art.

> "They just don't know what it is, they can't interpret it for themselves, they don't know where to have the required conversations". PK.

KT agrees it's a massive pity that South Africa has a government that doesn't support arts and culture. She believes that it's a huge asset for this country from an economic growth perspective but also from a social cohesion and healing perspective. Art, she argues, has the power to unite.

> "where government actually believes in and implements policies that are anchored in supporting arts in education, in culture and in cities and design. There could be huge transformational change in those cities and their people. Ultimately this is what we should be all advocating for". KT.

In the structure of the survey I mistakenly did not include the question regarding income for non-buyers. However, from the similar percentages of black and white respondents citing not being able to afford art and the higher percentage of black respondents indicting they know nothing about art, one can infer that access to information about the art world for black people is a more significant factor preventing them from entering the market as buyers. This lack of information about the art market is corroborated by my interviewees.

> "I definitely think that there could be more of my peers collecting art but they're just not aware or educated about what that means and what that looks like". BP.

Seventy two percent of non-buying Black respondents indicated that they would buy art in the future compared to 56% of white non-buyers which is an indication that

growth in the market will come from the black population as their wealth and access to the art world and information about the field increases.

7.3.4 Conclusion

South Africans of all races who are not buying art lack access to the art education and information about the artworld that could entice them in but, the lack of arts education in government schools has had a larger impact on the potential for black buyers to enter the market. In addition to this, non-buyers often do not have sufficient disposable income, particularly black people who have the added burden of black tax. The perceived exclusionary practices of art dealers and galleries impact both black and white potential buyers however as with most aspects of our society black people have the added factor of covert racism. Symbolic violence, as reflected in Labuscagne's study where white practitioners in the art world did not believe wealthy black people can appreciate art, inflicted on potential black buyers leads to them to believe it is a field in which they do not belong.

With the art world being an extreme case of an elite field, a reluctance to enter the field can be understood as a desire on the part of black actors to avoid the discomfort of entering a field that is in conflict with their habitus. This reflects Ingram and Abrahams' (2019) rejection response to finding oneself in a position of having a "cleft habitus".

I will now focus on the respondents to my survey who were buyers. There were 432 respondent who identified as buyers, 53 or 12% of whom were black and 379 or 88% were white.

7.4 Buyers

7.4.1 Social motives for buying

Both Bourdieu (2010:24) and Velthuis (2011:34) identified a social motive, the accumulation of social capital associated with buying art, whereas Labuscagne found this not be true for the South African collectors she interviewed. While I do not have any quantitative evidence for this motive, I do have qualitative evidence from my interviewees who reported that social factors are at play.

Art advisor KT related that all her clients, both black and white, buy art for a variety of reasons, from investments to social capital - “to have people come over for dinner and have that kickass artwork on the wall”. Collector NQ remarked that people who have money now buy art because it's a status symbol: “*oh wow she's so knowledgeable she's so worldly she has art”*. She goes on to say that even people who pretend not to care what other people think actually do as demonstrated by them driving expensive cars to show that they’ve made it. They “keep looking for the next thing to elevate yourself, a holiday home, you want to set yourself apart, so the next thing to show that I have arrived is I'm going to buy art*”.* NQ.

While recently discussing the cancellation of art fairs due to the coronavirus and suggesting online sales as a viable alternative, one collector commented that this would remove the vital social aspect of being seen at the VIP previews and socialising with other high net worth individuals who are also possible future business connections. These reports confirm that social motives do exist, and I have no doubt that how the art market responds to the cancellation of events that facilitate social engagement, albeit temporary, and how this might democratise and diversify the art world will be the subject for future studies.

7.4.2 Income and Education as factors for buyers:

Income

Within the two groups of buyers by race there is a relatively even distribution of incomes (Table 8-5). When plotted onto an income and population table 8-6, it is interesting to note that buyers come from across all income groups. As is to be expected in a luxury good market, however, 80% of buyers are in the upper income groups which comprise only 7% of the South African population earning over R10 000 per month. What is important for the purposes of my research is that the white population of South Africa have an ever-decreasing share of this upper income position as black people are increasingly entering the top 10% (Petrose, 2019).

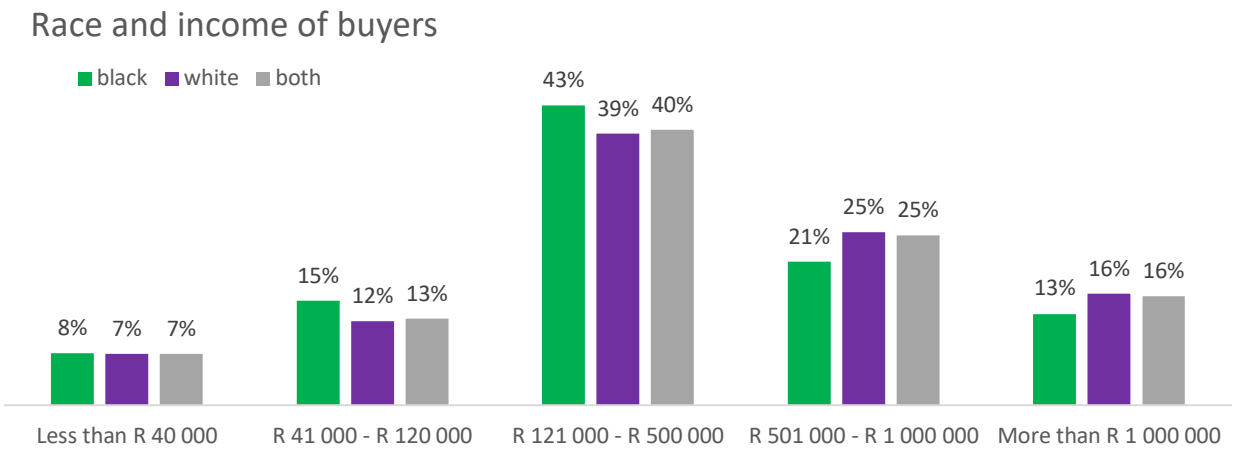


Table 7-5 Race and Income of Buyers

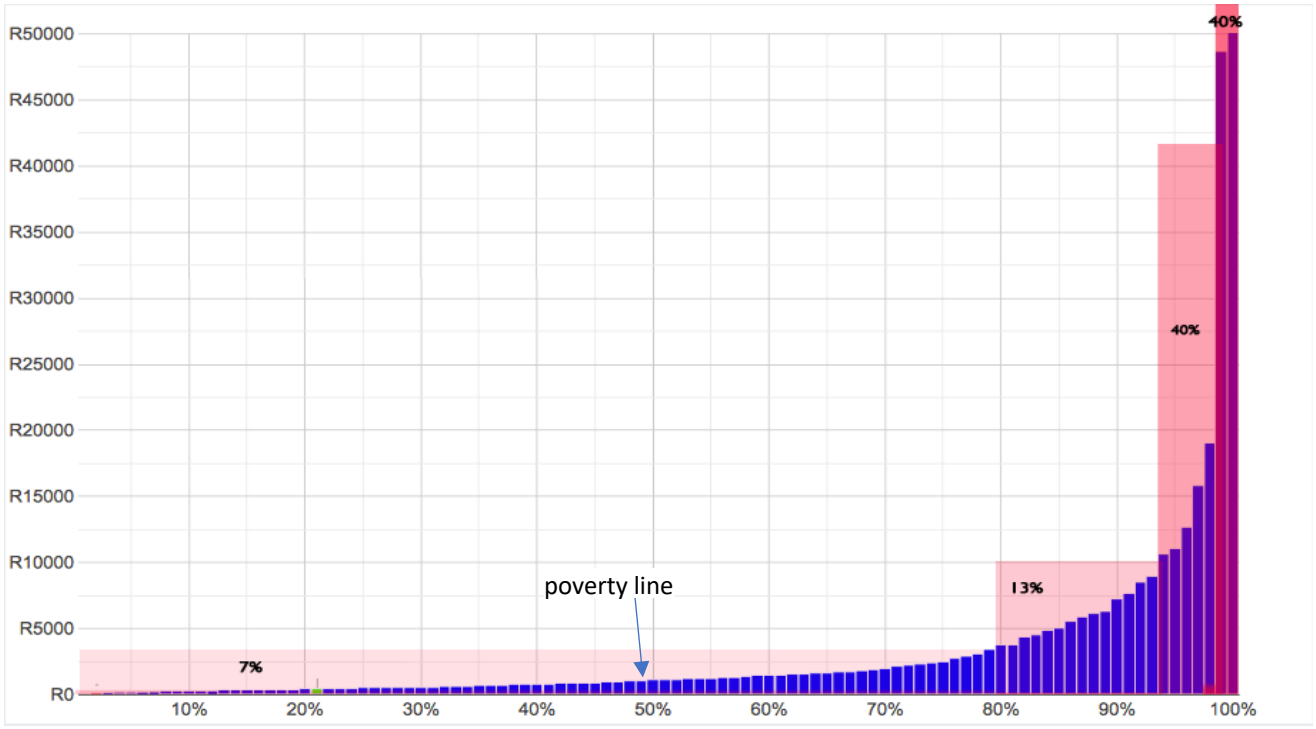


Table 7-6 South African income and population Saldru: 2019

The black majority's increasing participation as top income earners is a phenomenon that the art market needs to be aware of and pay attention to. Over 58% of the one million highest income earning households (5% of total population are in these households) are new entrants with almost 75% of the new entrants being black.

More than 50% of the top million households, earning over R40 000 per month, are white but now 33% of these are black, an increase of 8% since 2008 with the balance being of “coloured” and Indian descent (Lapperman in Fin24, 2019).

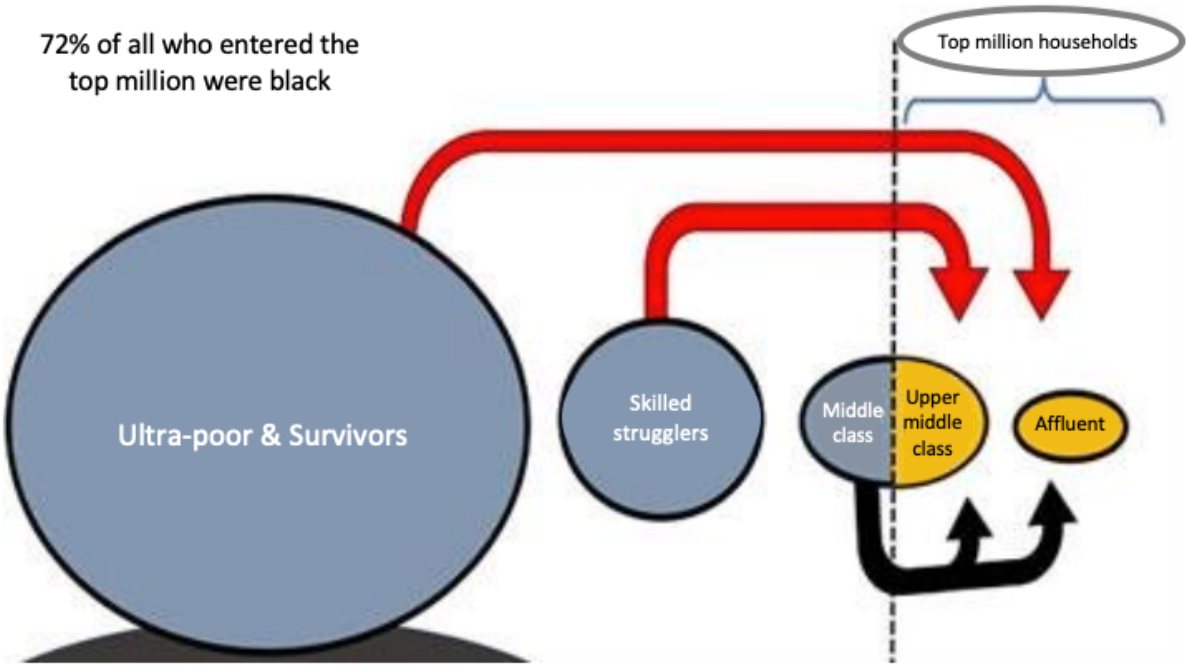


Figure 7 Illustration of socioeconomic shift. Source Fin24 2019

There has also been “"fast-tracking" from low income into wealth (bypassing the middle class) says Dr.James Lappeman, head of projects at the UCT Institute of Strategic Marketing” (Fin24, 2019).

> “*This was in part due to many of these South Africans getting an education and taking skilled jobs - which saw higher wage hikes over recent years. Also "partnering up" (moving in with a partner) has helped, with half of the top million households only making it into the group because they have more than one earner in the household, says Lappeman”* Fin24 (2019).

This fast tracking from “ultra-poor” to affluent would require a significant shift in habitus to contend with the new social fields being entered.

Nieftagodien and van der Berg (2007:10) argue that asset accumulation precedes middle class consumption for those without the benefits of generational wealth and with the pressures of “black tax”, and therefore this emerging black elite has less disposable income than their counterparts within the white elite. This phenomenon will have a direct impact on the availability of funds for potential black buyers to acquire art.

In my interview with collector SZ he clarified this, asserting that:

> “you need to understand the person and their particular circumstances. Cars and houses are easier to acquire because you can finance them even if you don’t have the cash. But if you want a work of art you have to pay upfront. Access to money is going to drive the behaviour*”.* SZ.

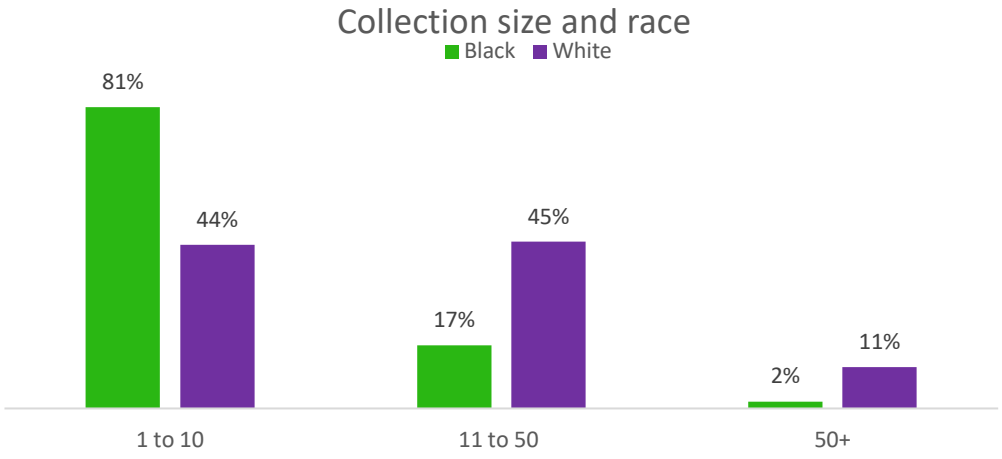


Table 7-7 Collection size and race

The phenomena of generational wealth being more prevalent within the white population and the relatively recent political and economic access of the black population in South Africa combined with black tax could account for less black buyers having collections of over 10 artworks (Table 8-7).

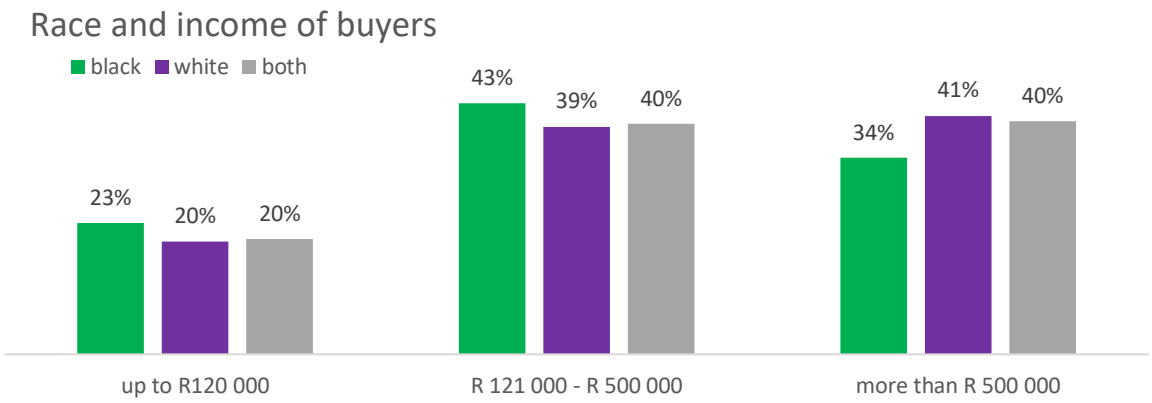


Table 7-8 Race and Income of Buyers

Black and white buyers had an even distribution of income levels within the two groups with similar percentages of low, mid and high-income earners indicating that differences in behaviours or motivations between the races cannot be ascribed to different income levels as there is parity within the sample, despite it being such a small sample for black buyers.

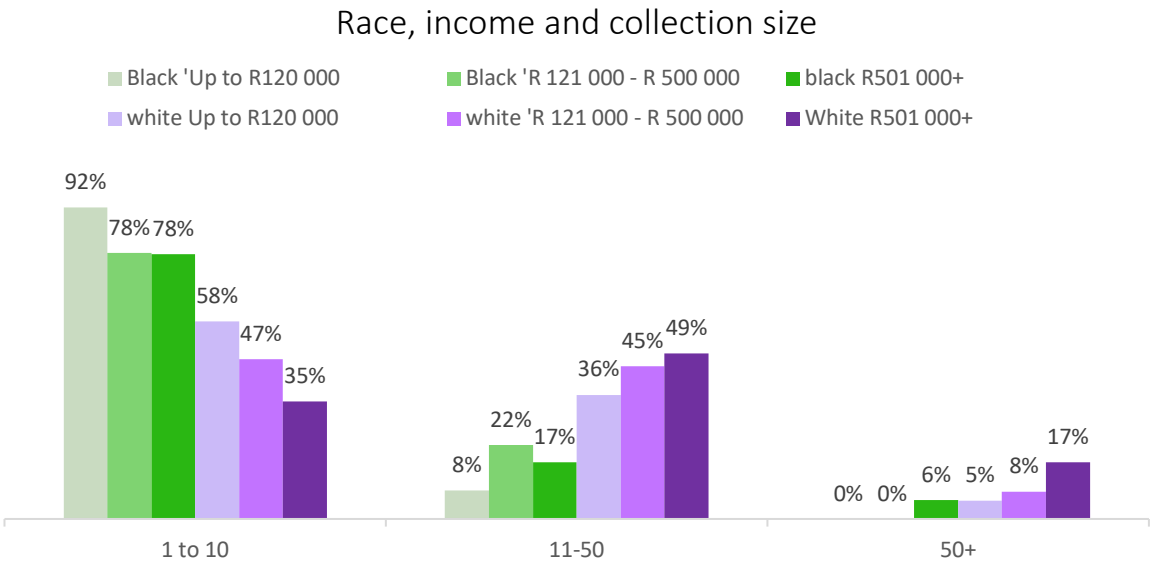


Table 7-9 Race, Income and Collection Size

Income similarities did not, however, translate into similarities in collection size amongst the two groups within equivalent income levels. This indicates that factors

other than income are influencing the differences in collection size between the race groups.

Ndinga-Kanga (2019) reported 58% of respondents “sending money home” and Nieftogodien and van der Berg (2007:2) report a “historical deficit in assets” as a hypothesis to explain racial differences in consumption patterns. The black community was excluded from owning capital and building wealth up until 1994 and therefore do not have generational wealth to contribute to the building of their collections. This, and the prevalence of black tax as reported by Ndinga-Kanga, will prevent black buyers from having disposable resources to build collections to the scale of the white buyers. Prior to 1994, in addition to not having economic access, black buyers and collectors would not have been part of the mainstream art world landscape. This is described by gallerist Linda Givon who reports events in Labuscagne (2010:18)

> “…where black artists and clientele to the gallery had to transform themselves into waiters when the ‘special police’ arrived; someone was always on the look-out for their presence”.

It is not difficult to deduce from this that collecting art was not an accessible pastime for black buyers during Apartheid.

Education Level

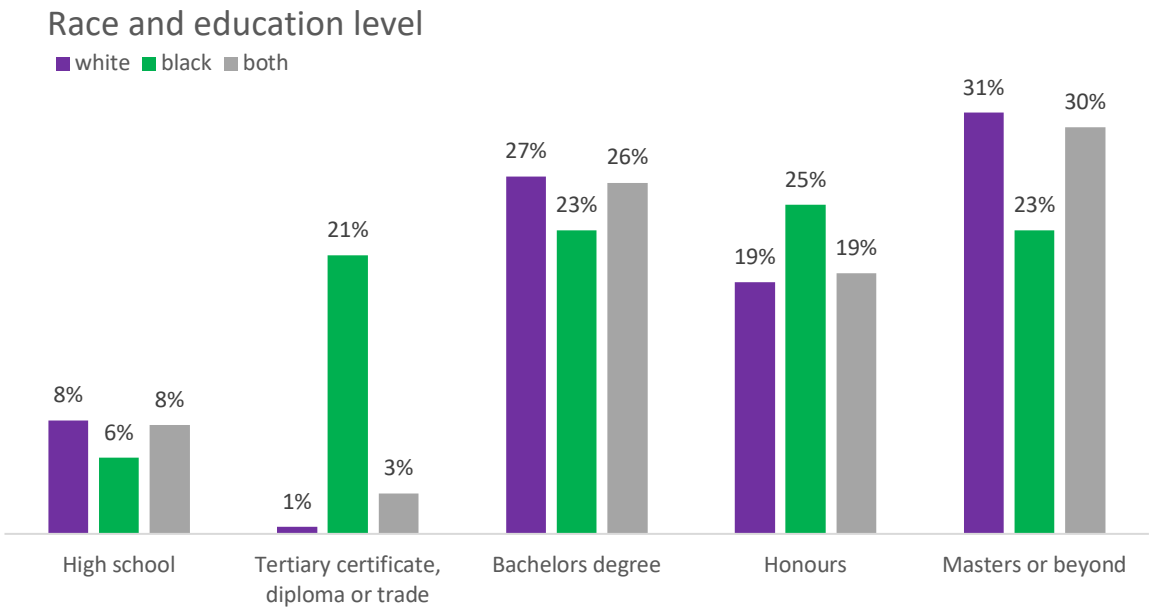


Table 7-10 Race and Education level of buyers

75% of all buyers have university degrees (Table 8-10). It is only with regards to having tertiary certificates, diplomas or trades that there is a much higher percentage of black buyers; however, the total of the sample for this category is only 3% so it cannot be deemed statistically relevant. I have therefore removed tertiary certificate, trade or diploma from the analysis to follow.

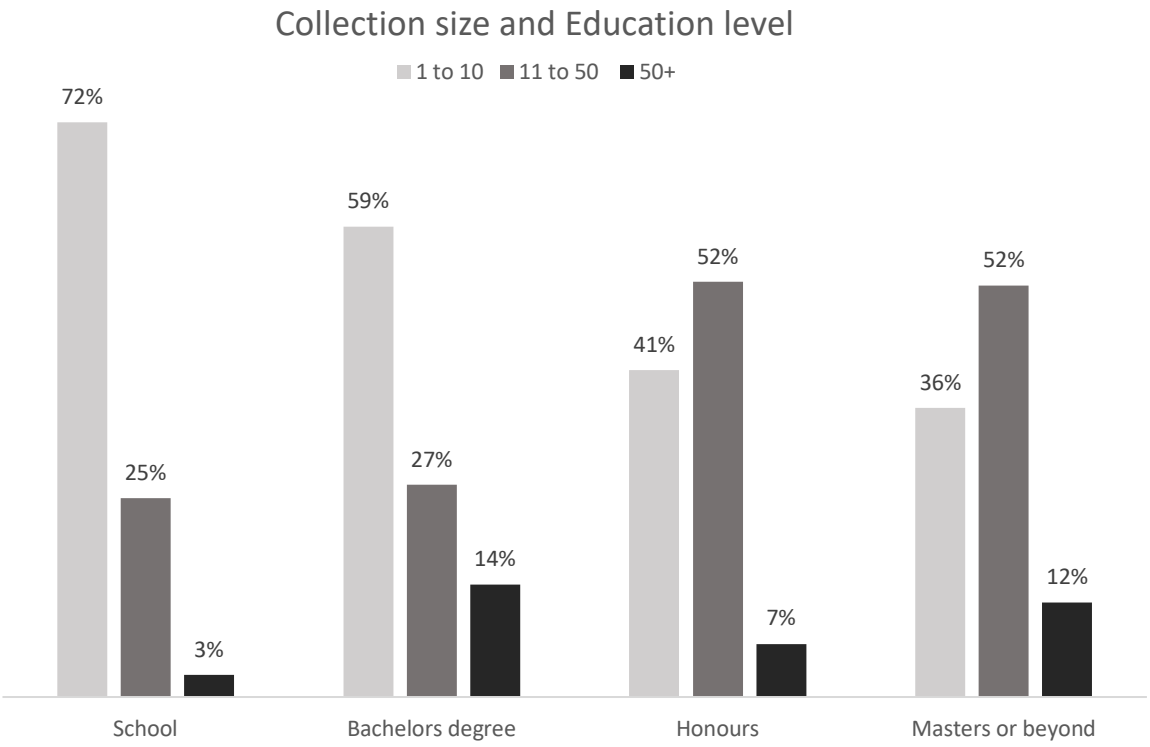


Table 7-11 Collection size and Education level

The percentage of bachelor's degree buyers with large collections is double that of buyers with honours degrees (Table 8-11). This is an anomaly in the data I cannot explain. I would have expected overall collection sizes to grow as education increases which is a possible research area for future studies.

Seventy five percent of all buyers of both groups have a university education. There are thus similar education levels and income distributions for the two race groups I am analysing.

This similarities in education and income levels mean they are not the differentiating factors to explain the lack of diversity in the art market and that when it comes to art buying, other factors are at play.

Collection size

Zwaans (2015) and Macintyre et al (2004) reported on the development of art collectors, discerning factors that motivated them and how their behaviour changed over time as their collections grew. I too will report on how motives and behaviours

might change as a buyer's collection expands, comparing buyers who own under 11 works, 11 to 50 works and those who have over 50 works (the serious collector), to better understand how motives and behaviours of buyers might change as their collections and thereby implied experience in the field grows.

Occasional buyers in Zwaans study bought primarily for decorative purposes but the serious collectors were motivated by social and financial reasons and factors extrinsic to the artwork, such as the reputation of the artist.

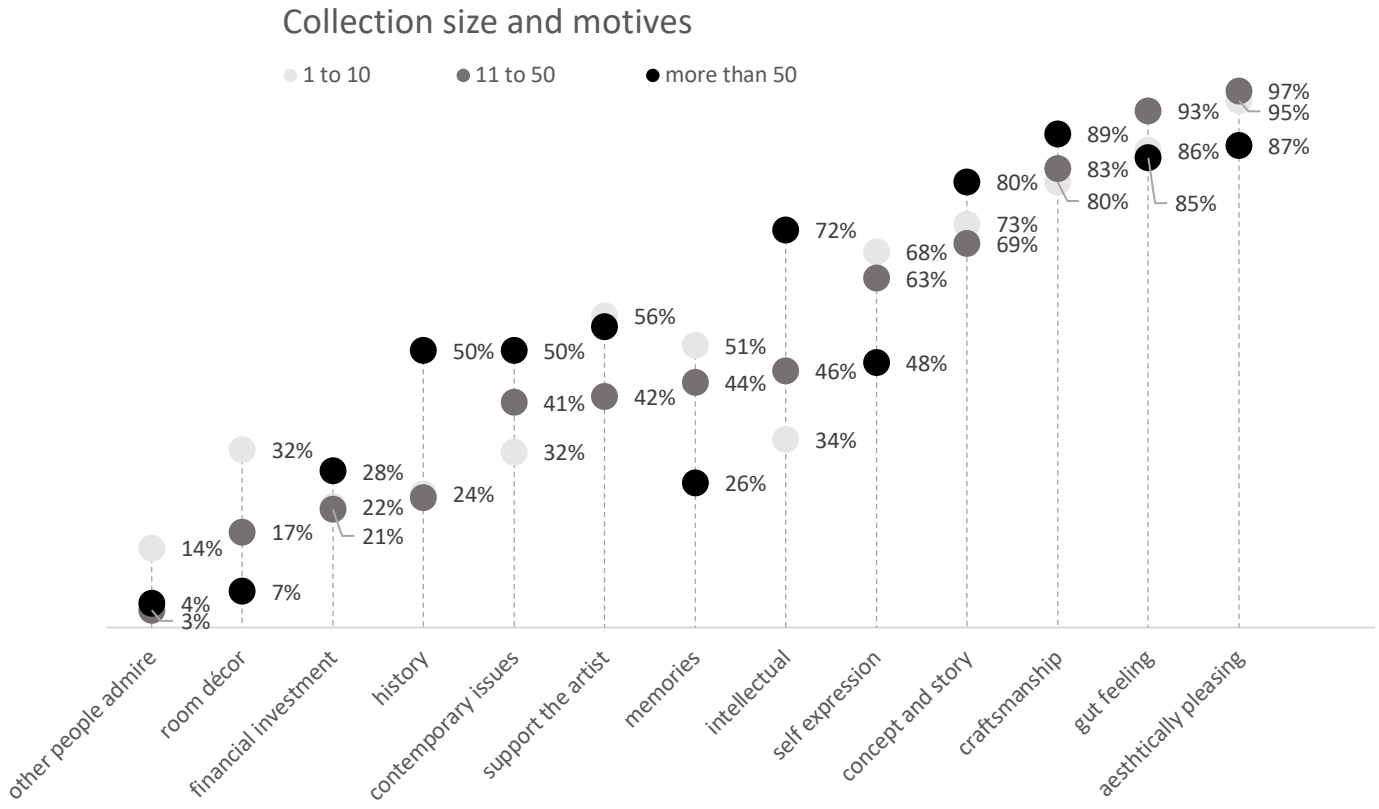


Table 7-12 Collection size and motives all buyers

Over 80% of all buyers regard craftmanship, gut feeling and aesthetically pleasing as important factors when buying art.

Factors that become less important to art buyers in my study as their collection size grows are other people admire, self-expression, room décor, memories. Gut feeling becomes slightly less important for collectors with large collections (serious

collectors in Zwaans and McIntyre's studies) as it may be seen to be opposite to intellectual engagement which Bourdieu articulates as the way the elite appreciate art. "Aesthetically pleasing" while being one of the most motivating factors amongst all buyers, becomes slightly less important once a collector has over 50 works in their collection (Table 8-12).

Factors that increase in importance as collection size grows are intellectual engagement, financial investment, historical importance, reflecting contemporary issues, concept or story. The movement of these factors supports Bourdieu's concept of highbrow taste indicating that, as a person's collection grows, they become more intellectually engaged with the work and its symbolic contents of story and historical relevance. They are less interested in the decorative and personal connection to the work. These results are also supported by Zwaans (2015) who found her "serious collectors" to be motivated by extrinsic, non-functional factors while occasional buyers were motivated by intrinsic or functional, decorative factors.

There was only a 7% increase in financial investment (Table 8-12) as a motive for those with more than 50 works in their collections whereas Zwaans (2015) found it to be a significant difference between her respondents with small and large collections. Only 28% of buyers with large collections indicated financial investment as a motive possibly responding to the inherent conflict in the art world between the correct way to collect art and the crass. As Coslor (2010) reported galleries "diminish purely financial investors" while valorising passionate collectors. A person with a large collection would be aware of this and resist being seen to be "breaking the rules" of the art world.

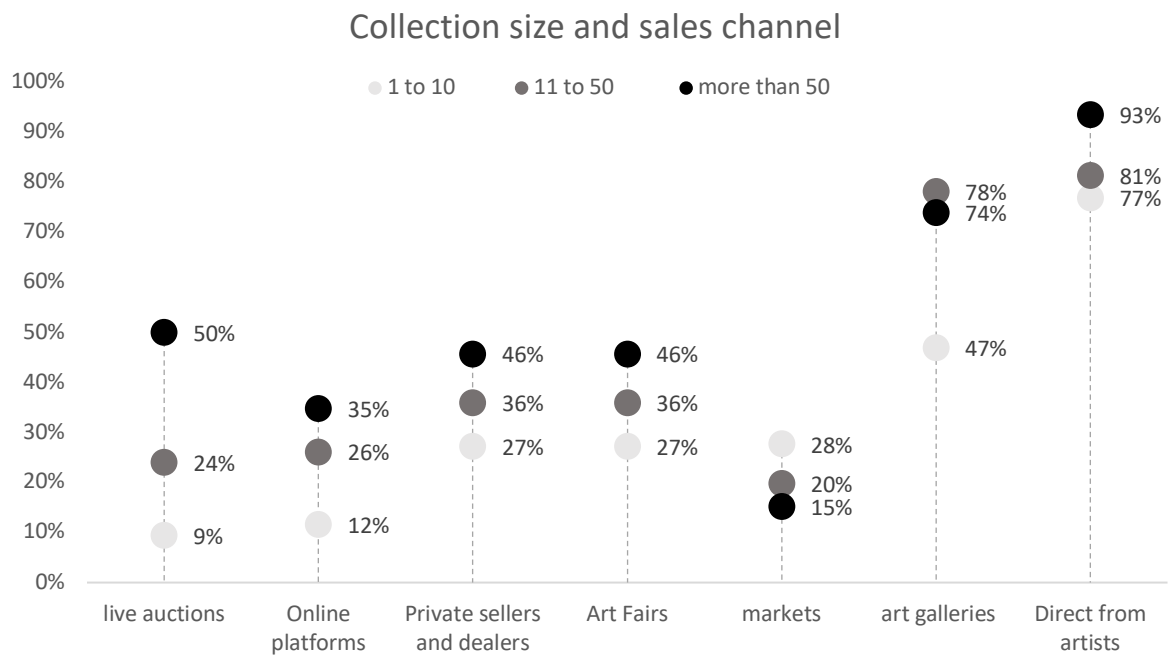


Table 7-13 Collection size and sales channel

Those buyers with large collections are 26% more likely to have bought on a live auction and 12% more likely to have bought direct from the artists compared to those with medium size collections (Table 8-13). Those with large collections are slightly less likely to have bought from markets. I believe this is because they think they are unlikely to find quality works of contemporary art at a market. Across all levels of collection size buyers are approaching and buying form the artists directly.

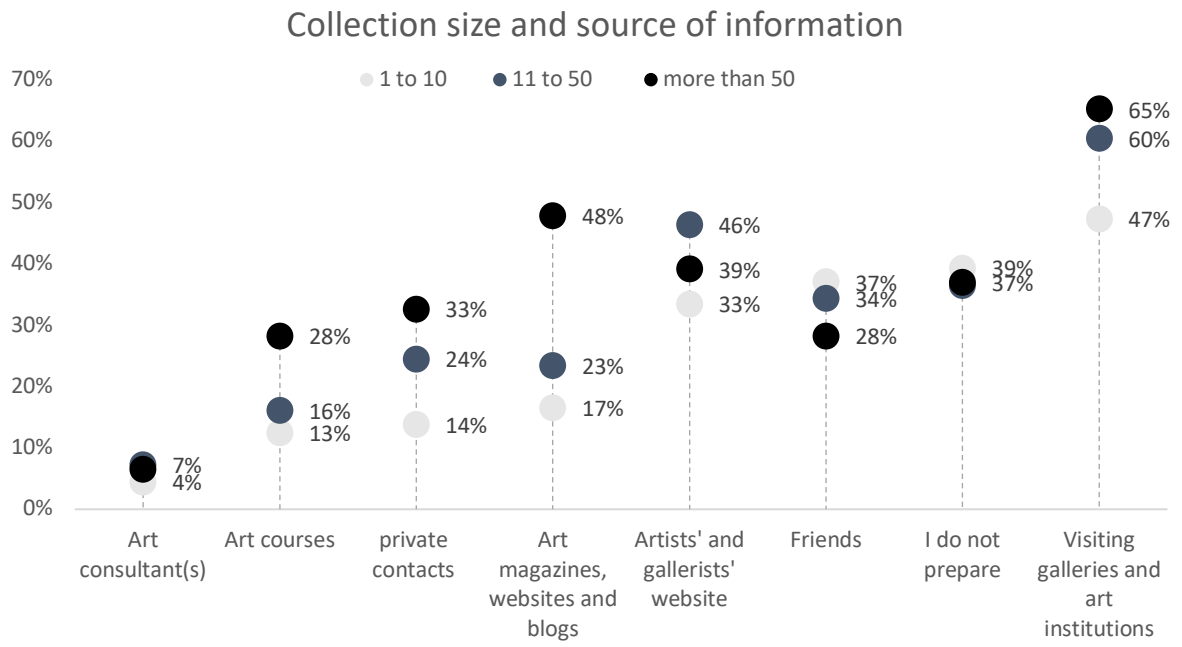


Table 7-14 Collection size and source of information

Visiting galleries and art institutions is the most common source of information across all buyers with artist and gallery websites coming next (Table 8-14). There is a significant jump of 25% between those with medium sized collections to large collections with regards to getting information from art magazines, websites and blogs. This could be an indication that as the buyer gets more invested in the art world, they become aware of, and are looking for, broader sources of information that could reflect the validation of artists they are interested in purchasing works by. Velthuis (2011) reports that the market for art relies on credible experts to ascribe value and it is these online sources that do provide independent reports on exhibitions and museum shows that consecrate artists and artworks as valuable and where critics publish their reviews of commercial art galleries shows.

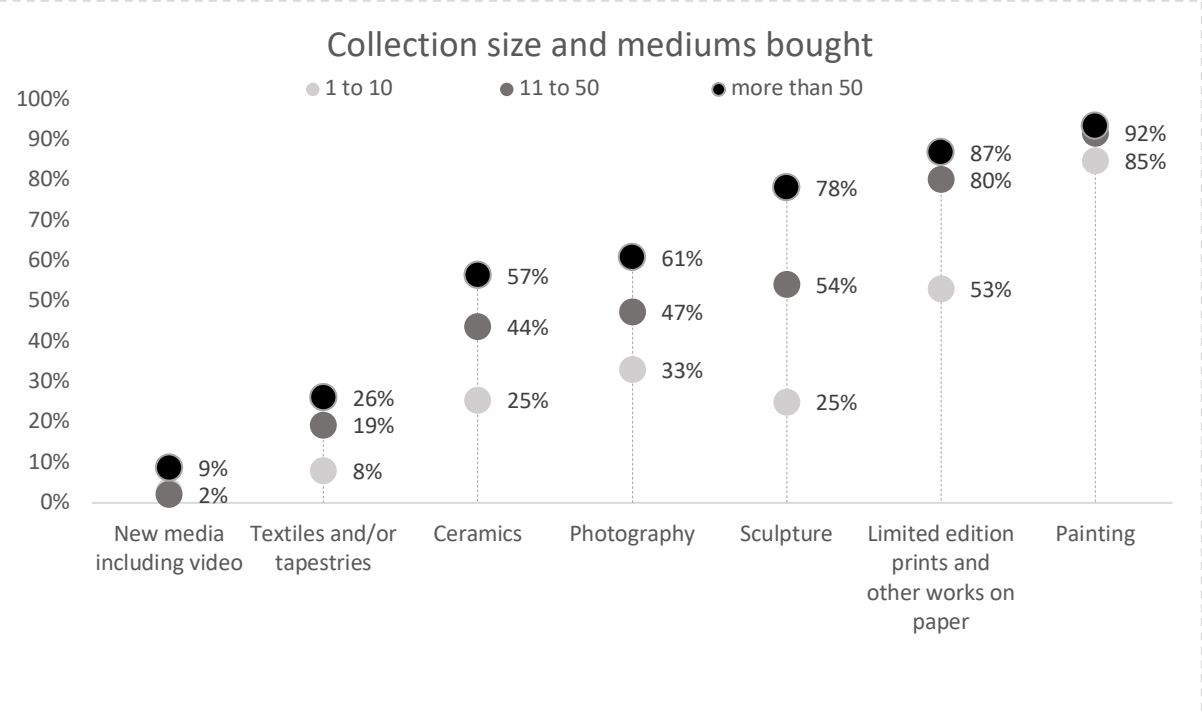


Table 7-15 Collection size and mediums bought

As is to be expected people with large collections have a broader range of mediums with more indicating they have each medium in their collection (Table 8-15).

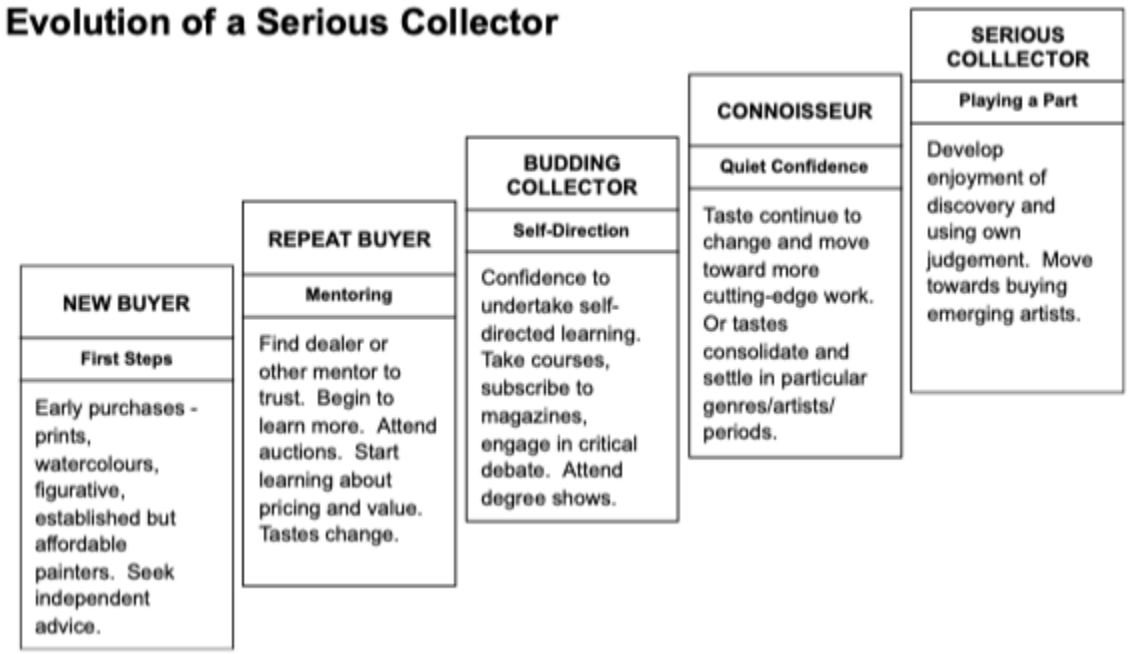


Figure 8 Evolution of the serious collector McIntyre et al (2004)

Small 1 to 10	Medium 11 to 50	Large More than 50
*Less likely to buy prints *Do buy paintings *Do not appear to seek independent advice *Do not attend auctions *Other people admire work *Decoration *Self-expression	*Now buying prints *Visit galleries and artists websites *Visit art galleries	*Buy a greater variety of mediums, including new media and sculpture (cutting edge?). *Subscribe to art magazines *Intellectual motives

Figure 9 Collection size descriptors

Comparing factors from my data related to factors and behaviours via collection size (Fig 9) to MacIntyre et al's (2004) model of the *Evolution of the Serious Collector (Fig 8)* below I will correlate:

Small- buyers with under 10 works and their new and repeat buyers.

Medium- buyers with 11 to 50 works with their budding collections.

Large- buyers with over 50 works and their connoisseur and serious collectors

MacIntyre et al (2004) do not reveal the metrics they use to categorise the different groups in their *Evolution of the Serious Collector* except to say it is based on frequency of buying. I am therefore making assumptions in order to make the comparisons I do.

The buyers in my sample with small collections (1) were less likely to buy prints, and do not appear to seek independent advice; in fact, they are slightly more likely to indicate that they "do not prepare" than those with larger collections (Table 8-14). This could be attributed to them buying works for decorative and non-intellectual purposes and being less involved in the art-world.

Unlike McIntyre et al's (2004) model (Fig 7) where repeat buyers attend auctions, buyers in my sample are slow to enter the auction market (Table 8-13). Only 9% of buyers with small collections attend art auctions by the time they have medium size collections, 24% are attending auctions and 50% of those with large collections attend auctions.

7.5 Race and buyer behaviour:

While my survey elicited very few black respondents, two of my interviewees indicated that they felt there were many more black collectors than the dearth that I was reading into my empirical results. Collector PK contended that most of the wealthy black people she knows have acquired art but they don't participate in the visible social art-scene which she feels is "a pity because like any other industry you need to be seen, you need role models, there are no art "influencers", there really aren't…who are black" (PK*).* Art advisor KT agrees with this saying, while not revealing numbers, that she has "many black collectors as clients" but the narrative in the art world is that there are very few. A curator at one of the major galleries reported it would be a "stretch" to say that even 5% of their buyers were black. Like PK ,KT suggests that this is perhaps because they are not as visible as they are not opening their own museums and being profiled in magazines. What SZ seems to report in the following statement is that there is a quiet and reserved "underground" of black collectors who are not known to the galleries:

> “There are many people in the black community who have historically made money, but no one knows about them so there’s nothing cultural about being black and wanting to show off, in every culture you get people who want to show off. There are a lot of rich black people that white people have never heard of. The galleries sometimes bring the black collectors in to speak but they aren’t necessarily the big collectors, they just happen to be the ones who socialise more”. SK.

KT supports this view when she reported:

> “In terms of my experience having worked in the space and having started my art advisory business about five years ago and when I started there was no doubt in my mind that a black elite, the majority of my clients are professionals - bankers, lawyers, business owners are predominantly the people I sell to or advise about artwork. They're typically a homeowner, have kids, are well travelled, educated etc.
>
> When I started there was no lack of enthusiasm, interest, curiosity and passion for art. And when I went into the space there were many black collectors in the sense that it was people whose homes I walked into and who had art, when I say art we're talking about quality artists with a reputation, a career etc people who are quite serious about collecting art for whatever their various reasons are”. KT.

While I have inferred from the small sample size of black buyers who responded to my survey and observations at art events that there are not many black buyers, perhaps this is a view that will need to be revised. My data might be more a reflection of my position in the art world as a white person as opposed to the reality. As Johnny Clegg[25] once remarked in conversation (circa 2000) that “we live in parallel universes” and perhaps I have only experienced the art world within the boundaries of a white European perspective. There could also be a phenomenon of

[25] South African musician, singer-songwriter, dancer, anthropologist and anti-apartheid activist

black buyers buying work that is not valorised by the mainstream commercial galleries and therefore fall outside of the purvey of the reach of my study. I will return to this notion in the next section.

Having established that the sample groups of black and white buyers have similar income and education distributions, I will now examine and analyse the data for how the behaviours and motivations of these two groups differ. There are a number of observations worth noting.

7.5.1 Race and nationality of the artist's work bought

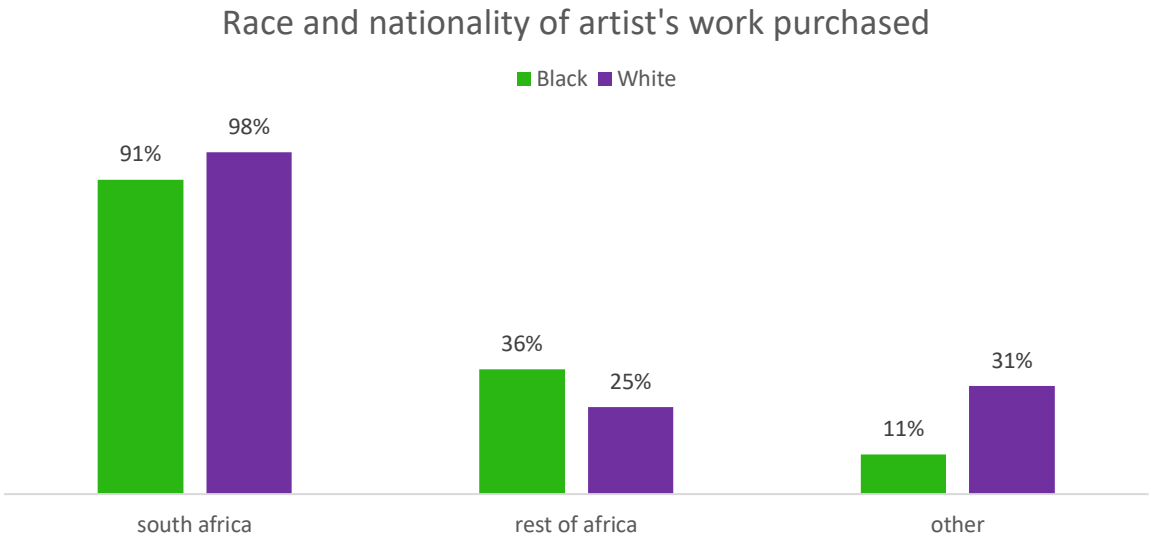


Table 7-16 Race and nationality of artist's work purchased

Black buyers supporting African cultural capital is evident in the nationality of the artists whose work is collected (Table 8-16). Only 11% of black buyers have bought work by artists not from the African continent compared to 31% of white buyers who have done so. Collector PK feels the reason for this is very simple;

> "White people buy art which is non-African because they are not Africans, I'm going to be as blunt as that. They relate to a particular palette that is very different that is not necessarily one that African collectors would. So in my

> case there's no way in a month of Sundays you would find me buying, if I could, the art of a white artist who is European, I buy lots of white South African artists, but definitely not European because I do it primarily as form of activism, I want to support the local art market, and that it is aesthetically pleasing and that it is also a way of unlocking the whole idea of dialogue for social change, all of those things count. My logic is why would I put my money in some European pocket". PK.

The data is supported by the findings of BASA's (2015a) report which found that white art enthusiasts were more interested in international cultural offerings whereas their black counterparts were inclined to consume local cultural content.

Most of the black collectors I interviewed placed support of the artists as their primary motivation. Collectors from across Africa primarily support their local artists but in South Africa, Zimbabwean and Mozambique artists are included in South African collections says collector PK.

LN reports this as follows:

> "This is paralleled with social stratification, the black buyer is growing with the black artists, for me that's how it started… I have friends who are artists and I wanted to support them; I am investing in them so I refuse to call myself a collector because it's not about me commodifying what they are doing its about me ensuring that they continue to have a practice ". LN.

NQ, however, having done a renowned art history course with South African teachers living in Europe, is looking at extending her collection to include European and American artists as she has been exposed to the fact that South African artists that are lauded locally can be unknown internationally and she would like to have artists of global renown in her collection. Her ownership of the work would be as a financial investment and to "set herself apart" socially and signify "success". Her position, however, is an exception to the other black collectors I interviewed.

Having done the same art history course as NQ, PK found the elevation of the western canon of artists to the detriment of African aesthetics in the course curriculum problematic. "Good art" was defined by the western canon and all art was viewed through this western lens. This implicit belittling of African cultural capital

relates Bourdieu's (1977) notion of the "imperialism of reason" where western notions of taste are deemed superior to all others. It is possible that, through the mechanism of symbolic violence collector NQ has been inculcated with the idea that internationally consecrated art is better than African art and thus she wishes to pursue this "international" work for her collection. Wallace (2018) argues that all cultures, and their concomitant tastes, should be viewed as equal and multiculturalism embraced in a working democracy. Interviewees reported a desire for this shift:

> "You know the effect of Apartheid will be felt still 100 years from now it's the saddest thing. Every now and then I have to check myself because a lot of my influence is very English and part of that has to do with the fact that my grandmother was an English teacher and that the Xhosa were into that whole English cultural influence, we were colonised, it's is the real thing, so every now and then you have to check yourself: is that my truth or is that what was told to me? It will take a while but the more we can be aware and can reflect on things and make changes the better". VS.

KT believes that as with white buyers, black buyers have a diverse range of reasons for buying art and one cannot collapse the "black elite" into a single homogenous mass. KT gave the analogy of the black elite having a whole lot of labels affixed to them, based on the past which they wish to shake off and now write their own narrative.

> "there was this transitional generation after Apartheid who moved into white suburbs and into the private schools or into corporate where there is a dominant white culture that we needed to define ourselves by, or prove ourselves to be worthy of and fit in with. But now what you're seeing is a completely new narrative, a shaking off, a redefining of how we want to view ourselves. And I think for many of my clients they are looking for art that resonates, art that is speaking to this moment, this idea". KT.

This intentional self-definition is something that Masoero (2014) discussed with regards to curators Njami and Enwezor using their curatorial practices and media platforms, NKA and Revue Noire, to rewrite the narrative of art from the African continent. PK reported when interviewed that:

> “If you look at west Africa on the other hand, simply because of their history and the fact that they for some reason did not particularly embrace the idea of art being defined through a western lens have a completely different appreciation of what art history is. You won’t hear Nigerian people talking about Damien Hirst as an example. They talk about their own art and their own art history”. PK.

This lack of reverence of the western canon in West Africa could be the result of the work done by Njami and Enwezor amongst others. PK like KT believes that black South Africans are not yet in control of their own histories as told by the western canon of the art world. KT’s clients want artwork that affirms who they are in a positive way and she finds a lot of the artwork that's consecrated by the South African art world right now contains images of black people in poverty, in the townships or portrayed in ways that just doesn’t resonate with her clients. Then *“*there are certain artists that do resonate but often they are not seen as a *“*successful artist” in the art world*”(*KT). This lack of endorsement or validation of artworks that do not fit with the western canon yet resonate with black buyers fits directly into Bourdieu’s *Theory of Distinction*. It illustrates a situation where tastes of the dominant class are deemed superior and legitimate and the tastes of the subaltern are rendered invalid.

PK, having viewed an exhibition of a young black female artists in a local gallery, remarked:

> “The whole idea is that to be a successful artist you need to be a successful artist internationally at Basel or Frieze, it’s what it is… and after a while you get tired, this is the first exhibition I have seen since September”.

As reported by Kabov (2019) there is a danger that the need for western validation for an artists or artwork to be deemed legitimate could change the way that (South) African artists make work. SZ is of the opinion that this is exactly what has happened with one of South Africa’s globally revered black artists:

> I have huge respect for xxxx but there are certain undertones in their work that I don’t like as a collector for me they seem to appear to be showcasing black people in the same way white people would like to do but can’t, because

it will look racist if they did. Because they have the cultural equity to do those things the European curators will pick them and the standard in the world is that if you are showcased in Europe and the United States you are now international, and we are now to assume that as fact. Guys like Njami talk about building culture from the ground up. We don't really need the endorsement of the so-called international community. For me Pemba, Sebidi, Feni are all significant, even Irma Stern, she is significant in our art history. Ideally, I would want an environment where people like what we like, and we define what we think is great rather than an external person determining on our behalf". SZ.

This view of the South African art world is held by many of the collectors I interviewed and is supported by the findings of Khunou (2013) and Ngoma (2016) who reported that recently affluent black persons resist attempts by marketers and researchers to define and categorise them as they believe one of the freedoms afforded them in our burgeoning democracy is to be able to define oneself.

"There are black artists who have been overlooked for the longest of times, so our natural gravitation will be to invest our money in our own. Because we've seen the people, the tribes who make it are the tribes who support one another. For a long time black people have been divided. The whites taught us to go against each other. It's taken us so long to unite as a people and now that we have discovered the secret to success, we need to invest in our culture, our heritage and history. All of these things we are now doing as much as we can in the short life time that we have to make sure that we put our artists and creators front and centre on the global stage. And our hope is that our children and their children build from here. So yes if I have a million Rands how much of it am I going to spend on black artists? 95%". VS.

Whilst it is a reality that Western culture dominates validity and legitimacy of tastes in the art world within the South African art market there are three possible approaches to remedy this position. The first is to ensure that art education in South Africa ,while including the western canon, places emphasis and focus on establishing and elevating the African canon. The second is changing the structures of validation

within the South African art market to be more diverse and inclusive and the third is by educating the art buying market towards the African canon. The first two reflect an endorsement of African cultural capital and they all play a role in interrupting the perpetuation of the symbolic violence perpetrated by colonialism and Apartheid.

But collector PK believes “in order for us to build cultural capital that is South African a lot of work will have to go into it over and above just getting black people to buy art”.

To change the narrative and endorse African cultural capital advisor KT believes,

> “we need more black galleries and institutions and more black men and women on the boards of galleries etc. Diversity is important. And you won't get that diversity reflected back in tastes if you don't have key people in institutions positions and roles that can actually impact and make a difference in that narrative. If the artworld has a Eurocentric focus it is because it is made up of people. And if we start to dissect what those people look like you'll start to see that they come from a certain race or gender but of course that is changing which is a good thing. It does have to have much more diversity and diverse views, not just black artist creating the work but black culture makers and industry shapers. I think increasingly we'll see that change. And of course particularly in the South African context it’s so important from the history we come from”.

Collector NQ is equally positive about the shift that she sees taking place with gallery owners and curators who are seeing that there is an emerging black market that they need to cater for. “Now you can see a work of art and it reminds me of home, it reminds me of where I grew up”.

LN questions the reasons for European buyers’ interest in African art:

> “Collectors are anxious to remain relevant and the question is are European buyers of African art buying into the message, the skill, the craft or are they just buying relevance? Gallerists are doing the same thing…”. LN.

7.5.2 Race and source of information

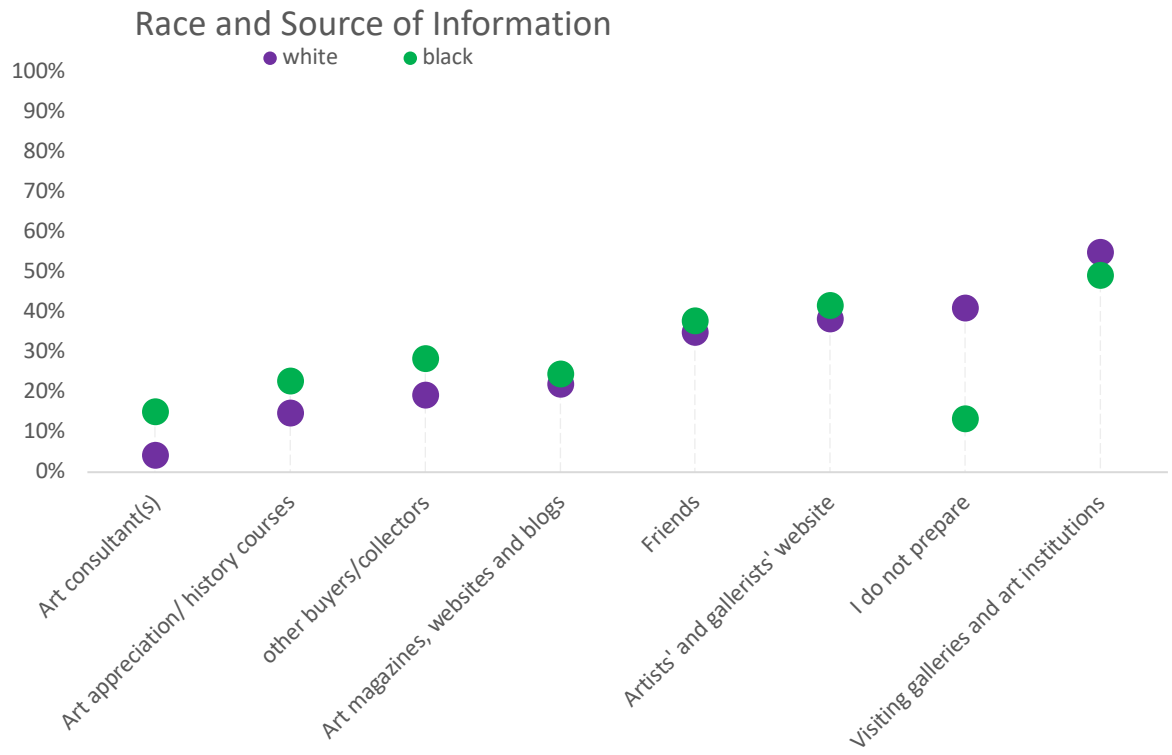


Table 7-17 Race and Source of Information

While black respondents are slightly (7%) more likely to report having done art appreciation or art history courses (Table 8-17), interviewees reported wanting different courses to those available.

> "I was supposed to do an art history course and I asked for the details. I looked through and we needed 5 full days to do the course and this is what we are going to go through. I just whizzed through it and I though "wow this is not going to benefit me in any way," The French this, the European that and I thought do I really want to spend Rxxxx getting a white persons perspective on all of this and learn more about the European perspective, I would rather spend this money learning more about African art. We are hungry for more information, we don't know enough but we want an African perspective.. and we are willing to pay for it". VS.

Black buyers were less likely to respond that they “do not prepare” when considering buying an artwork (Table 8-17). Forty one percent of white buyers responded that they “do not prepare” compared to only 13% of black buyers. This, I believe, can be attributed to a lack of confidence in black buyers in their own knowledge of the art world and judgement of their own tastes given the pressure to conform to western notions of taste. This lack of confidence is further affirmed by black buyers being 10% less likely than white buyers to say that they use their “gut feeling” to purchase artworks and 11% more said they were influenced by other people’s opinion of the work (Table 8-15).

The lack of confidence could also be ascribed to their lack of trust in the art market, a factor identified by ArtTactic (2019). Information asymmetry between the seller and the buyer and the lack of objective information about the pricing of works as reported by Velthuis (2012) would contribute to this lack of trust. Within the context of Bourdieu’s Theory of Distinction, perceived differences in social capital would also contribute to this lack of trust. Within South Africa there is the added burden of lack of trust between races.

Collector NQ believes the art world has the potential to be exploitative and one should talk to a lot of different knowledgeable people and get their advice before buying. She was exploited by someone she trusted who pushed her to buy work by an artist that no one else was buying for R 50 000 and now it’s only worth R2 500. As a result, she doesn’t only talk to one person, she talks to many, from art foundations, curators, gallerists, PhD students and art enthusiasts. She is building her networks by going to galleries and art fairs but is fortunate to have married a collector so had an introduction to the art world space but that's not the case for everyone. Now she is introducing her friends to her network and they are starting to buy art. NQ is however concerned that some dealers are taking advantage of their naivety.

SK gave the same advice to new collectors:

> “If you are collecting as an investment you must go to the art snobs because if you buy on your own and end up with work no one wants to buy from you, you are going to have buyer’s remorse. Not all their calls will be correct but you stand less of a chance of straying from what is regarded as collectible “SK

The field of art (in the Bourdieusian “battlefield” sense of the term) is in conflict with black buyers’ habitus leading to this lack of confidence and trust in the field. The dominance of western cultural aesthetics and their being canonised as the only true ‘legitimate” taste makers alienates potential buyers who have not been introduced to the art world and its “rules”.

Historical and current symbolic violence inflicted on black buyers erodes their potential sense of belonging within in the field. KT remarked that the work that resonated with her buyers is not always validated by the inner circle of the art world, a phenomenon Velthuis (2015) remarked upon in relation to the local market in China. Velthuis dismissed the art world’s disdain for “local tastes” as shortsighted on the part of the art world as buyers of this work could over time develop more sophisticated tastes and extend their collecting into the realm of “legitimate” contemporary art. Velthuis’s position, however, still exerts the legitimacy of the West’s cultural dominance.

VS spoke of a resistance to the dismissal of local tastes when she reported:

> “We recognise that we are that are powerful and are doing everything we can to say ” look here.. this artist and this artist have the same talent if not more”. Let us bring recognition where it's due and that recognition isn't going to come from 3 Europeans who have decided to start a committee in the middle of Honolulu and now they are the authority. No… we don't give power to this forum to say these are good enough and these are not good enough. We will profile our own. We will support our own financially and otherwise and we will create the equality that is so desperately need it in this world”. VS.

7.5.3 Race and source of interest

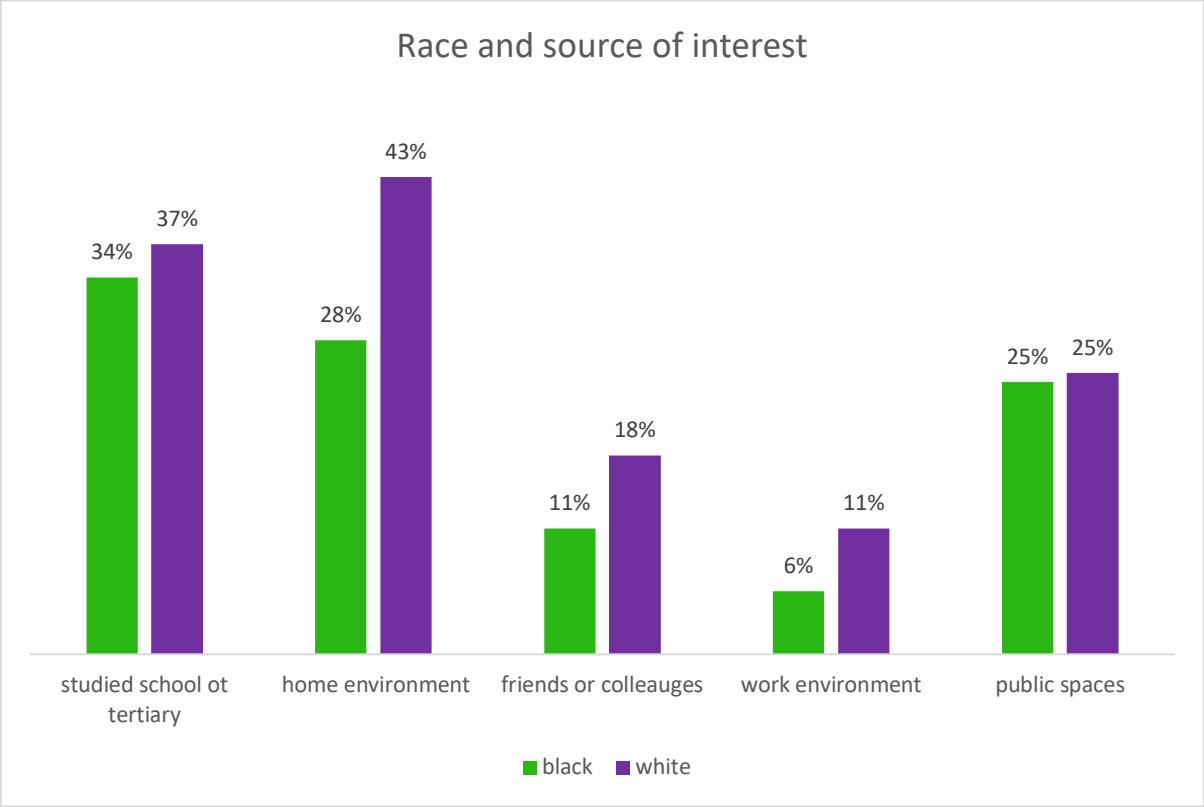


Table 7-18 Race and source of interest

It is interesting to note that the greatest difference in source of initial interest in art between the races is “home environment” where there were 15% fewer black respondents than white. This is understandable given the lack of access to the arts and economic disempowerment of black people during Apartheid and the absence of arts education in most township schools. The denial of access to information is something VS reported:

> “We see why the old system had to withhold knowledge and information because that's the real key. If you really want to oppress someone don't give them a book, don't give them information because now that we have it you can see what we able to do it”. VS.

SZ introduces social media as something he believes is going to have an impact on introducing people to the art world:

> “It is going to change because the whole world is deconstruction colonial stereotypes and social media is going to become part of the great influence as

people pick up your stories and there is information dissemination outside of the formal system. Unfortunately, galleries will always battle with legitimacy because there is always a profit motive”. SK.

Social media influencers were proposed by PK as a way to reach a broader audience when she reported that “You need influencers, you need intentional influencers, not just people wo dip into art. You need people who are absolutely committed to it”. Like any other industry you need to be seen, you need role models, there are no art “influencers”, there really aren’t…who are black”. PK.

7.5.4 Race and motivating factors

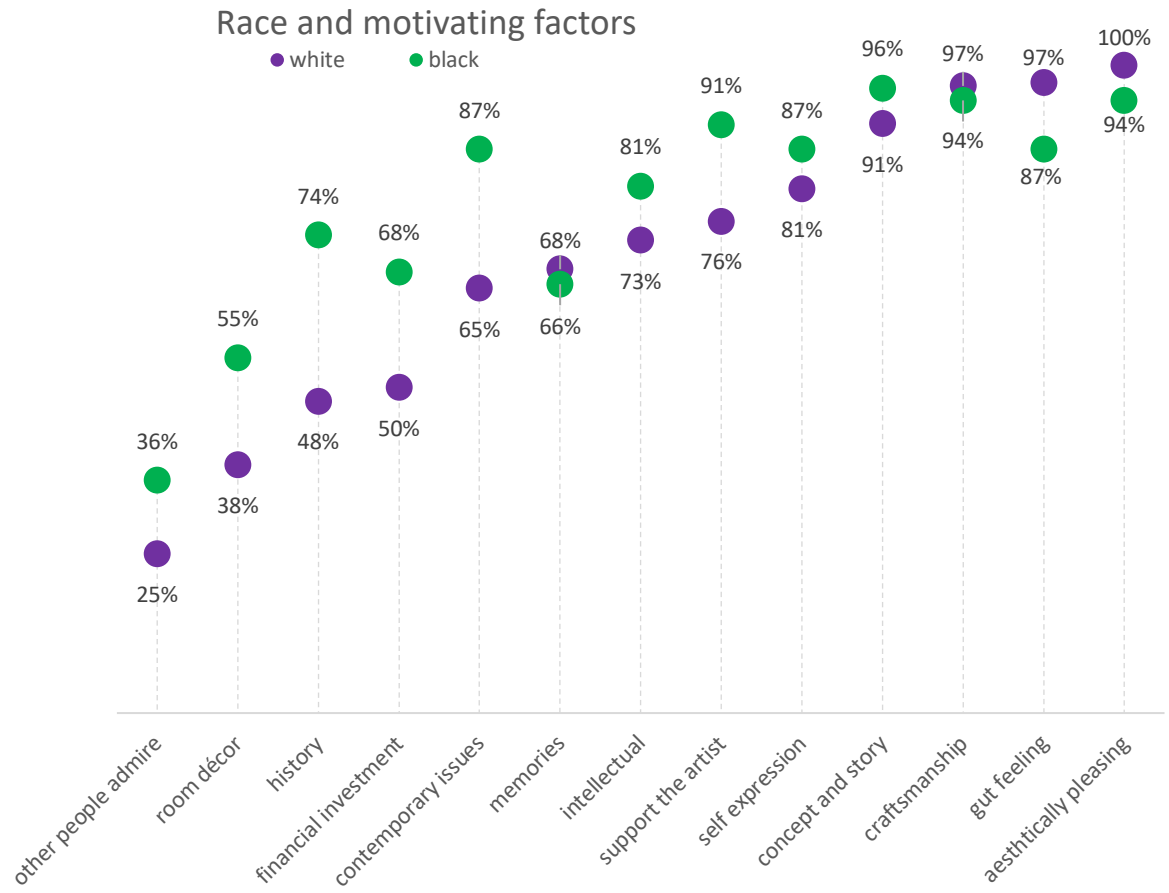


Table 7-19 Race and motivations

Three factors where black buyers responded much higher than white buyers were those of the work having historical importance (26% higher), reflecting contemporary issues (22% higher) and wanting to support the artists (15% higher) (Table 8-19). These factors can be linked directly into Bourdieu's concept of cultural capital as has been seen in the analysis of the data and interview responses regarding the nationality of the artists black buyers collect. The black collectors interviewed view buying art from Africans as an act of building and investing in African cultural capital. For black buyers in South Africa the assertion of their "minority" cultural capital, which has historically been demarcated as lacking legitimacy, is vitally important.

7.5.5 Race and sales channel

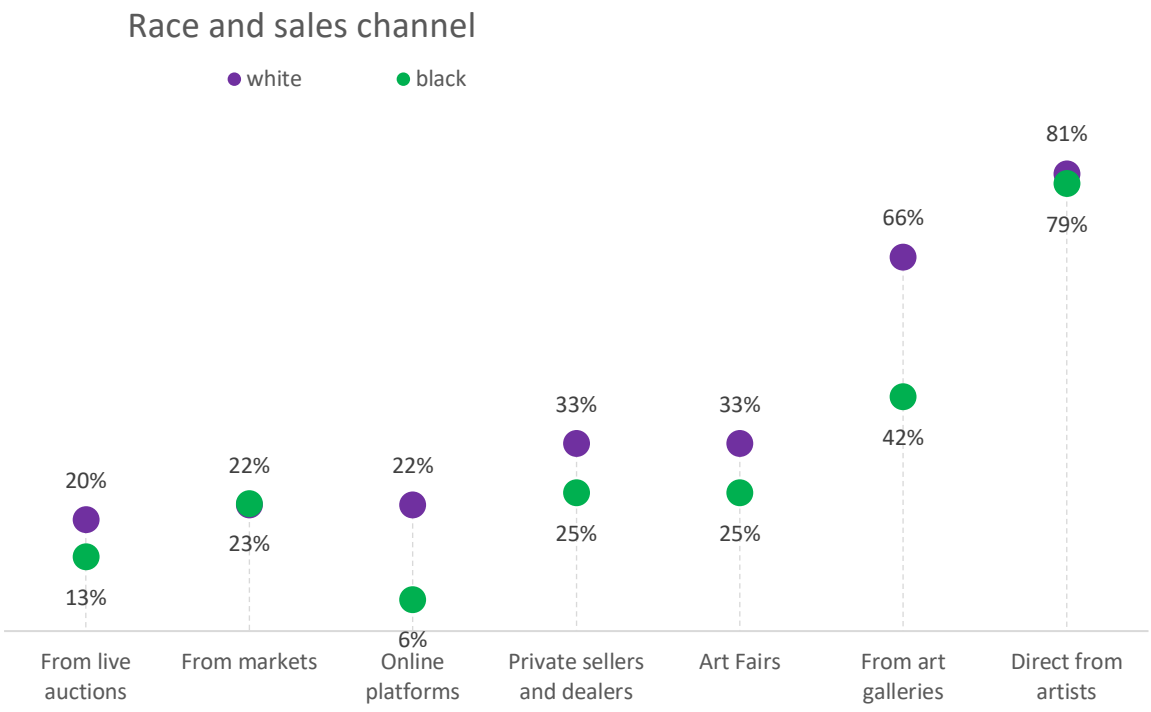


Table 7-20 Race and sales channels

I was surprised to see a lower percentage of black buyers (6%) than white (22%) buying online (Table 8-20) as the black buyer sample was younger than the white buyer sample. This is an anomaly in the data that I cannot yet explain.

Black buyers are 24% less inclined than white buyers to buy art from commercial art galleries in South Africa (Table 8-20). This can be attributed to number of their practices that are deemed exclusionary. The lack of prices on the walls next to works was identified by the McIntyre et al's (2004) study as a barrier to purchasing from galleries in the UK. If a person lacks confidence in a field, as my data shows black buyers do, engaging with the often white and "elite" docents to ask for the prices could be off-putting.

> "I always felt and still do feel excluded from the art world and never feel comfortable walking into galleries because of my skin colour and class". Black Female non-buying online survey respondent aged 18-29

Collector NQ is suspicious of white gallerists motives because she believes most of them "know that I have the cash but don't yet have the knowledge, so some of them will push me to buy what is not selling to their other buyers who are more knowledgeable".

The reality of this perception is confirmed by SZ who reported:

> "What confuses some of the newer collectors and what people don't want to have happen is: they go to a gallery and a work is pushed onto them. Later they sit with a network of black collectors who start saying "you got ripped off" Then they start thinking they mustn't go to the galleries because people are telling them they could do better. A lot of the galleries have young ones on the ground and the owners aren't seeing who the buyers are and what questions they are asking". *SZ.*

These phenomena result in a lack of trust in the galleries and a lack of confidence in one's own decision making capacity.

One of the black collectors interviewed reported that "new" moneyed black collectors are charged more for the work than their white counterparts. This could be

apocryphal[26] however it is a perception that will require a concerted effort to overcome. This lack of trust in the galleries by black people could be a result of the overwhelming dominance of white owners and managers within these spaces.

The second factor could be galleries wanting to sell to reputable collectors who are able to increase the subscription and thus the value of the work. In South Africa, many of the black buyers have “new money” and are recent entrants thus their collections are not yet deemed credible and “worthy” and, as reported by a number of the collectors I interviewed, not visible. They reported that there are “many” black collectors who are quietly building collections while avoiding the limelight and not being profiled in the media.

Collector LN reported that a black collector he knows has been trying to buy a particular work, but the white gallerist won’t take them seriously and LN believes it is because “they don’t fit the picture of what the gallerists think a collector should be. So, the buyer is undermined … but that is history”.

To underscore this view KT reported her experience from when she first started engaging with the art world and she and her husband had bought an artwork from a gallery in Cape Town. The gallery had been dealing with her husband via email and she believes they thought he was white as their surname is an Anglo-Saxon one. KT happened to be in Cape Town and popped into the gallery unannounced to see and possibly collect the work personally. She found the way she was treated in the gallery shocking. A young curator met her at the entrance then called the gallerist who then called their partner and “*the whole time I was treated like a criminal”.* But her experience with this kind of prejudicial behaviour is not just in the art world. It exists in the business world, restaurants and hotels. At the time of my interview KT had just spent time in Cape Town at the Art Fair and found it to be much the same, remarking “you're constantly having to prove yourself based simply on the colour of your skin”.

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[26] of doubtful authenticity, although widely circulated as being true.

KT does however qualify this view saying “South African galleries do have black clients already on their books and they are starting to understand their preferences and tastes”. Confirming this is NQ who reported “I see a shift gallery owners and curators are seeing that there is an emerging black market that they need to cater for and things are shifting now you can see a work of art and it reminds me of home, it reminds me of where I grew up”. NQ.

The phenomenon of being vetted by the galleries however is not just a South African phenomenon. PK related the story of enquiring via email for the catalogue of an exhibition by a South African artist opening at a well-known American gallery in New York. She was not impressed by the email response: “There’s a high demand for it, tell us about your collection in order for us to determine whether we will send you the catalogue”. PK.

Whether the American gallery was responding as they would do to all unknown enquiries or just those from South Africa or Africa or enquiries from people with African names is unknown but it does confirm the overtly exclusionary nature of the gallery towards “new money” (Kabov:2015).

When discussing the shadow of a charge of fraud laid against one of South Africa’s few black gallerists, a black collector was heard at an art event asking, “Who do I go to now?”

> “there are black people with a lot of money that would buy art but question whether they trust a white person, maybe we need more galleries that speak more towards the majority”. AN.

The location of the Johannesburg art fair in the traditionally white suburb of Sandton is problematic for one young collector I interviewed. AN believes that the location of the fair implies that the work sold there is for white people, even if the artist is black and potential black buyers would rather go directly to the artist.

> *“*The mainstream galleries have picked a handful of artists they are going to push… ‘let’s not flood the market with a whole lot of names we can’t even pronounce…let’s wait a bit.’ The market isn’t going to work that way …there are a lot of artists that have not been brought to the fore by the galleries and the black collectors are starting to know about them. I know quite a few of the

> collectors and we sit and chat but there is not a conscious thing of checking in, but we do talk to each other… and there is an underground movement of people who are starting to dig a little bit and as you dig you talk about stuff*".* SZ.

It seems the only truly comfortable space for black buyers is direct from the artists themselves. 1-54 Fair director Touria El Glaomi said that a factor holding back the growth of the fairs on the African continent is that "African collectors buy directly form the artists" (Brady:2019).

> "The wealthiest black people actually do collect art, we assume they don't but they do…They will haggle and refuse to buy from galleries which I find problematic. They always want to go and haggle with the artist , so when you walk into their homes they have not only masters, like Sekoto and Pemba but they also have work by younger artists. But they will only buy from the artists directly". PK.

> "People think they will buy cheaper from the artists but actually at the core is people buying into stories. When you go to a lot of the galleries you see Mashile Koloane etc. but no-one in the gallery can take you through who they are and their story. You find little white girls who won't tell you the stories because they don't know it… so when you go to artists there is the warmth of relating to the artists and to the story. The artists will tell you about other artists and then you start knowing what's going on. It's a different network that the galleries are not active in telling the stories of". SZ.

To conclude this analysis of black collectors' relationships with commercial galleries the interviewees in my study have identified three reasons why black collectors are not invested in buying from the mainstream commercial galleries.

The first relates to a lack of trust in some of the galleries who some black buyers believe are talking advantage of the information asymmetry reported by Velthuis. The second is a feeling that the galleries are not supporting and doing enough promotion of black artists whose work speaks more directly to the market. The galleries are supporting western cultural capital over that of African cultural capital, which fits clearly into Bourdieu's theory of distinction and the power and dominance

of majority cultural capital. Masoero (2014) and Kabov (2015) have identified this as a challenge to artists on the African continent and black buyers are responding to this. The third factor was reported to me by SZ and is that a buyer can get a better deal or have a more personal and deep engagement with the artwork and story behind it when buying directly from the artist. It is important, however, to note that white buyers are also buying direct from artists but not at the expense of galleries to the same extent as black buyers. In addition to this coda, it is important not to overlook that 42% of black buyers do report buying from galleries (Table 8-20) and, as KT said, *"*South African galleries do have black clients already on their books and they are starting to understand their preferences and tastes*"*. KT.

7.5.6 Race and mediums bought

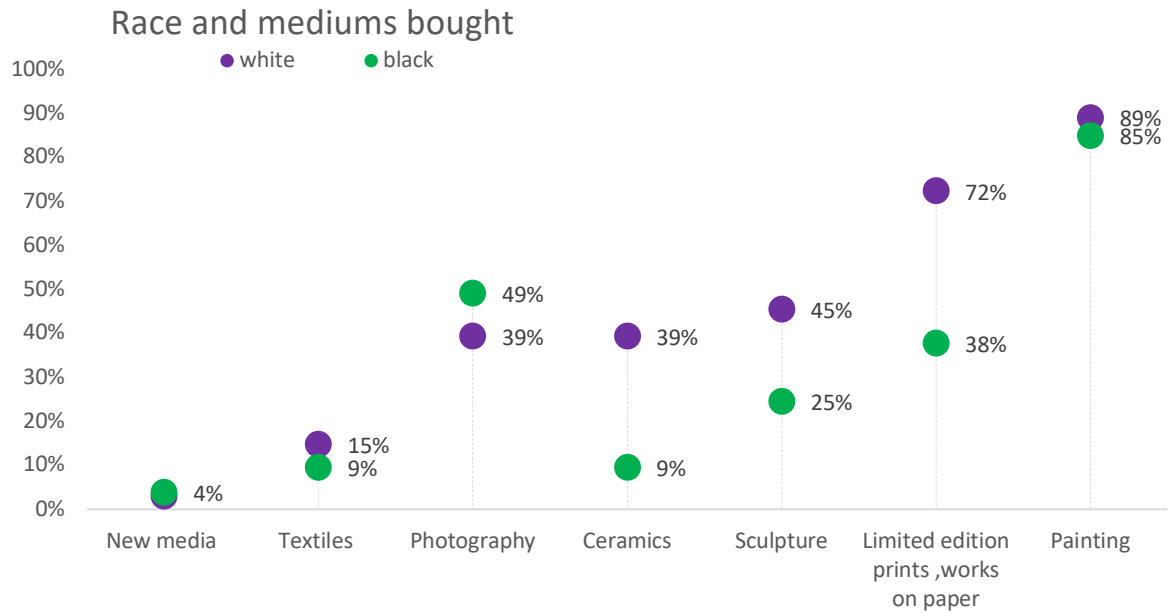


Table 7-21 Race and mediums bought

Photography is the only medium that has a higher percentage of black buyers (49%) than white (39%) (Table 8-21). Since the turn of the century there has been a boom in the emergence of African fine art photographers having an impact on the international market with many of them dealing with issues of African culture, race and identity. Zeitz MOCAA has a "tilt" towards photography (O'Toole: 2018).

Leading African curator Azu Nwagbogu started LagosPhoto with the express intention of challenging Western conceptions of Africans and African's conceptions of themselves. With the trend towards female African photographers dealing with the subject matter of identity, Nwagbogu contents is a way to address the absence of the black figure in international museums and, with their work, these artists are able to unequivocally declare their presence (O'Toole: 2018). Black buyers supporting photography is an indication that they too want to ensure that the black body is represented legitimately in the global arena.

LN had an interesting contribution to the notion of disseminating African voices in the art world when he reported:

> "I don't believe gallerists often believe the stories of the artists they are selling but they want relevance for their business. They have a fear of being out of loop… This does, however, allow black narratives to disseminate which solidifies those voices in history which is a good outcome ". LN.

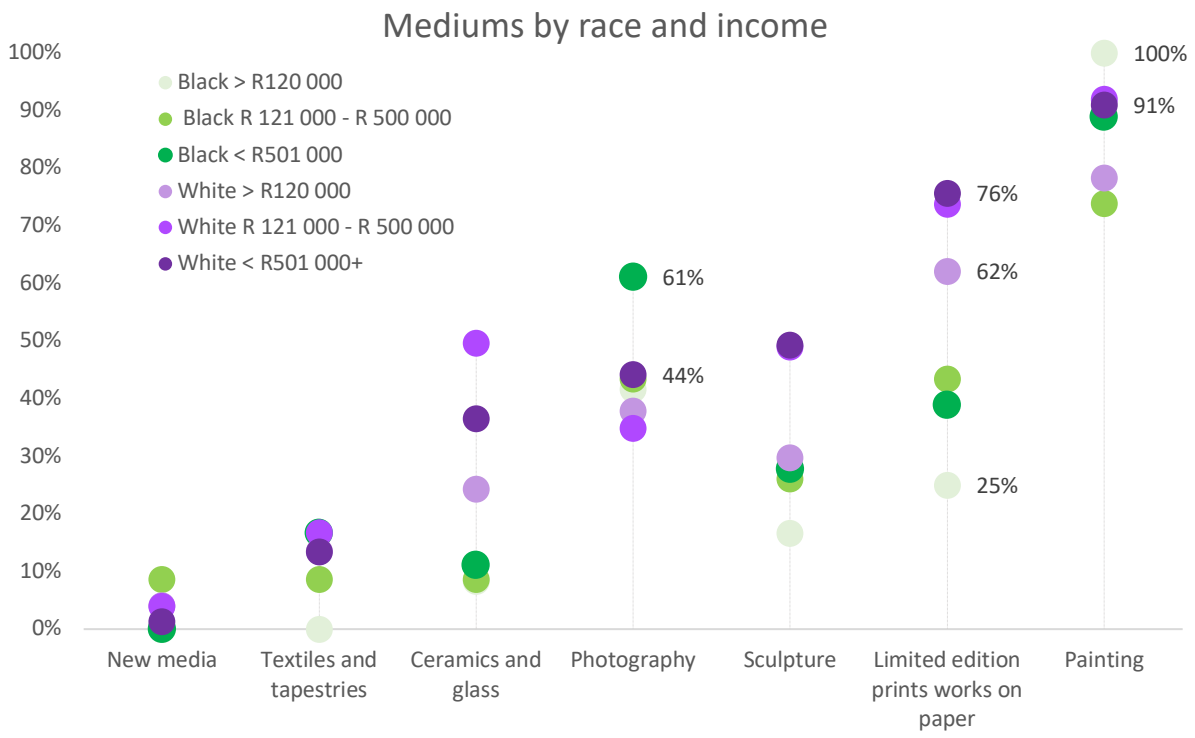


Table 7-22 Mediums bought by race and income

Photographs are an example of a “multiple” or edition in the art world. The earliest multiples are limited edition prints, work made by the artist in collaboration with a master printer to produce more than one rendition of an image. The distinction between limited edition prints - lithographs, etchings, linocuts or woodcuts - is often misconstrued. The term “print” is often misunderstood to mean a copy of the original when in fact a limited-edition print is an original work by an artist. These works are often the most affordable of an artist’s work but remain original works by the artist and can be a way to cautiously enter the art market as a buyer without the risk of making an expensive mistake. It is of interest to my study that only 38% of black buyers have bought a limited-edition print whereas 72% or white buyers have - a difference of 34% (Table 8-21). There are a number of organisations in South Africa, such as Artist’s Proof Studios, doing work to address this; however, the data suggests more needs to be done. Thirty seven percent less lower income black buyers have bought limited edition prints than their white counterparts (Table 8-22) with all lower income black buyers reporting that they have bought a painting.

SZ has a different view of this:

> “you have some people who buy on recommendations of galleries and it then depends on what they are punting. Galleries would rather sell a R60 000 work on canvas than a R5000 limited edition print, so it’s a commercial thing”. SK.

This phenomenon, however, would apply to both black and white collectors so does not explain the racial disparity. In my own experience there are a number of black collectors who have not been exposed to limited edition prints as a collectible medium so education and access would seem to be a more credible explanation.

8 Conclusion

I have reviewed the market reports concerning the international, continental and local art markets and the literature regarding the nature of the art market. Since buying art can be understood as an economic transaction rooted in a sociological action I invoked the literature of sociologist Bourdieu. Given the racialised nature of contemporary South African society and the context of this study being both post-

colonial and post-Apartheid, I also reviewed the work of contemporary Bourdieusian scholars to understand the functioning of our society to enable me to interpret the data generated by my study on the factors driving demand for contemporary art in South Africa.

A mixed methods study was best suited to the subject as the empirical data was able to inform the questions asked of my interviewees and vice-versa, generating a rich and meaningful view of the art buyers landscape.

The motives of the art buying public in South Africa align closely to the motivating factors in the global north. However there is a wealth of data that requires one to view the black buyers, both existing and potential, through an African as opposed to Eurocentric lens. Some members of this diverse and nuanced group of individuals are participating fully in the contemporary art world as buyers. However the insidious residue of Apartheid and global lack of endorsement of African or minority cultural capital is pushing them towards art buying as a form of activism as they fight, within the field (in the Bourdieusian battlefield sense of the term) of contemporary art, for the elevation of African cultural capital onto an even foothold within the Eurocentric canon of contemporary art.

Black people can experience discomfort and alienation within Eurocentric fields and the artworld is a case in point. Whilst being less certain of their position and the required disposition expected within the field of art, they use the buying of art as an opportunity to assert their identities and culture and strive to be seen. The art world is a hostile space where, if they have the stomach for the fight, they are able to find expression of and support their own culture and lived experience. African cultural capital has not yet achieved dominance in the South African art world despite 24 years post democracy. In South Africa, African cultural capital should be the majority cultural capital but this is not the case. European notions of taste still dominate our market as generational wealth, historical access to education and social reproduction has ensured that the white minority in the country continue to dominate the art world as owners, managers and buyers with black artists providing the cultural content to be sold. Interviewees reported thinking that the phenomena of white buyers and sellers of African art was done out of expedience rather than true interest and understanding of its cultural value.

For black buyers in post-colonial and post-Apartheid South Africa there is a real struggle to find a comfortable way for their habitus to integrate with the elite Eurocentric field of the art world. Historically excluded from the field they now enter the field as newcomers without the rules of the field embedded in their habitus. They have three ways of dealing with this.

Firstly, they can choose to respond to the symbolic violence of the field that has left them feeling “this is not for me” or avoid the discomfort of the cleft habitus and just not participate. Being part of the art world is a choice, it is not meeting any basic needs and there are other ways of achieving social status and self actualisation that, for potential black buyers, do not include needing to mould oneself to an unwelcoming opaque and elitist field. I believe it is an unwillingness to even enter the field at all that has shaped the demographic structure of the art world in South Africa.

The second method is adapting one’s habitus to the field. Some writers interpret Bourdieu’s concept of habitus as being fixed and immovable. However, Flisback argued that as one’s habitus is created over time through one’s experiences of different fields, there is no reason why new experiences cannot be adding to or shifting one’s habitus over time. Bourdieu was writing in a time and about a society that was very stable, but his concepts do not depend on that stability and can be adapted and shifted to be useful in contemporary South Africa. This shifting habitus in the face of new fields is something that black South Africans in post-Apartheid South Africa have needed to do. Growing up in homes where ones’ parents had no opportunities for education and being the first in one’s family to achieve a tertiary education and enter high paid professional positions is a reality for many black South Africans. Integrating rural family and culture into the life of an educated professional is the topic of many radio shows I have heard. There are also issues of mother tongue not being spoken to one’s children who then cannot communicate with their grandparents, cultural rituals not being adhered to and conflict with one’s parents about lifestyle and responsibilities. Within the field of the art world shifting one’s habitus can be done by acquiring more social capital, extending one’s network to include art world professionals, taking courses in art and thus learning the “rules of the field”. An explanation for the black buyers who indicated they prepare more, take courses and read widely and who take into consideration the opinions of others before buying art could be that they are making the effort to shift their habitus by

acquiring the knowledge and networks to participate fully in the art world as it exists. NX doing an intensive art course and attending almost all available events in the art world and now looking to buy “international ‘work is a good example of this.

Luxury brand strategist VS, when discussing her navigation of the rural world she grew up in and the elite suburban life she now leads, remarked “I’m half assimilating at half trying to create a new world and it's very uncomfortable and very scary”. VS. What she is describing is the third type of response to a cleft habitus. This relates to Bhabha’s concept of the third space where one does not change one’s habitus to suit the field but finds a totally different way of being. This I believe is what much of the evidence is pointing towards. Black buyers are asserting their own cultural capital by supporting their stories and history and steering the contemporary South African and African art world to a new space. This is being done collaboratively between black African artists and buyers driving a new narrative of what is legitimate art and culture in South Africa.

My findings and the incorporation of the idea of a Third Space are compelling for policymakers within the sector. At the level of government and the Departments of Arts and Culture and Education in particular, the lack of comprehensive arts education within all schools is maintaining barriers to inclusivity in the art world. This will have a long-term impact on the growth of the contemporary art sector. Without exposure to, and knowledge about art, people are reluctant to enter the field. Support is required for national and regional art institutions and museums to build a strong South African network of validation, consecration and legitimisation of South African cultural capital. By introducing arts education and institutions that focus on, and draw attention to, the value of African cultural capital and Africa’s own art history the sector will be able to build appreciation and validation of unique voices within the field and move away from relying on external systems of validation that push a Eurocentric narrative. As Rotinwa (2020) reports:

> “Artist visibility and art history education across Africa are key to solidifying the market there for the long term, since hurdles such as colonial borders and language differences can impinge on its development. (Ivorian curator Yacouba) Konate believes that showing African artists to African audiences underscores that opportunities on the continent are not solely dependent on the

interests of the cultural West. “[I] want to tell them: ‘You have the right to culture with a capital C. Contemporary applies to you.’”

For art dealers, galleries and art advisors, a review of what they believe to be important or valid artwork needs to take into consideration where we are and the value of our local cultural capital. There needs to be greater transparency and revelation of pricing and market functioning and embracing of new buyers as potential future mega collectors. My data did reveal shifts in the dispositions of galleries but, as with all of South African society, the symbolic violence of the past needs to be addressed.

8.1 Postscript

The academic process has allowed me to reflexively contemplate my work and experience as an art practitioner. To view my field through a new lens of current and historical academic thinkers and writers has deeply expanded my knowledge and understanding of what I thought I knew about the art world and enriched and enhanced my practice within the sector.

In the last week, whilst finalising this report, the world has been upended by COVID-19, the novel coronavirus. The impact on the art world, as with all sectors of society and the economy, has been and will continue to be enormous. With the cancellation of all travel and large gatherings, the international art fairs that have become key moments in the art world, that allowed gallerists to meet with buyers from across the globe, have been removed from the calendar. This, combined with the closure of most galleries’ physical spaces, has seismically shifted art world activity onto the internet and into the virtual world. How the collectors and buyers of art will respond to the lack of personal and social engagement provided by the physical spaces and events is unknown at this time. As most people struggle to keep their businesses and share portfolios buoyant there will be considerable pressure on disposable income which will have a direct impact on buyer’s willingness to buy art.

Commercial art galleries are now revealing primary market prices on their websites which has led to more transparency in the market than ever seen in the past. This transparency could lead to an increase in economic activity as the opacity of the

market was seen as a key barrier to the growth of artworks as an asset class (ArtTactic,2019:46). This phenomenon, in addition to the instability of other areas of the financial markets, could lead to growth in sales of “blue chip” or historically important artworks which have been known to retain or increase in value during times of financial instability.

In 2018 Anders Petterson, the founder of ArtTactic, reported to Brady (2018) that “the 2009 crisis helped to elevate art “to an alternative asset class for wealthy individuals who were looking for asset protection and diversification, as well as emotional and social returns”. Banks, he adds, “are increasingly offering loans against art, enabling more capital to be freed up”. A cuddly relationship with the finance world could be a double-edged sword. An increased dependence on the financial markets, Petterson says, is “a trend that I believe will shape the art market over the next decade, both in terms of opportunities as well as heightened risks”.

Major museum and institutions around the globe have made their collections and galleries available to view online across multiple platforms including virtual reality experiences. Whether this new way of exhibiting will attract broader or different audiences than the physical spaces and will become permanent additions to the art landscape is yet to be seen. Likewise, it will be interesting to assess audience engagement and if there is a significant uptake of purchasing art online.

8.2 Future research

Most of my interviews with black buyers and collectors included a conversation about artist Nelson Makamo whose work sells globally and locally but appears to the black buyers to be underrated by the art “elite”. He is, however, the first artist mentioned by potential new black buyers as someone whose work they would like to own as his work resonates with them. It would be interesting to use this phenomenon as the basis for understanding popular versus elite tastes in South Africa.

I believe a larger scale survey of black buyers only would yield further insights into the multidimensionality and nuance within this market. SZ, PK and KT all reported a counter public of black buyers operating outside of the traditional contemporary art

world and the limitations of my convenience sample suggests that there is an entire ecosystem that remained outside of my study.

As commented by this paper's external examiner Valerie Kabov: "Substantive research can be carried out intra-continentally, comparatively with an understanding of structural difference of colonial impact in Africa and chronologies of independence, both of which impact on wealth formation, cultural engagement which differentiate West African art markets from those of South Africa".

Kabov continues: "Similarly any further study would benefit from exploration of difference in the operation and impact of settler and non-settler colonialism, which distinguishes West and Southern African experience and possibly the difference between nature of French and English colonial modes in connection with culture. This understanding is really crucial to the ability of newly independent states to build and re-build cultural capital and potentially argue for example that in non-settler colonies to re-build and cultivate indigenous cultural capital in the way that is much more difficult in settler colonies like South Africa".

Reports by my interviewees confirm that social motives do exist and I have no doubt that how the art market responds to the cancellation of events that facilitate social engagement due to the global pandemic, albeit temporary, and how this might democratise and diversify the art world will be the subject for future studies.

The global pandemic is and will continue to cause seismic shifts in the contemporary art market globally and in South Africa. I believe this phenomenon to be of key interest to researchers in cultural policy and management and the creative economy.

9 Glossary of Bourdieusian terms from Oxford reference

Types of **Capital**:

> **Economic Capital**: Economic resources (monetary and property assets). For the wealthy bourgeois this is 'the dominant principle of domination', transferable from generation to generation and thus effective in reproducing social power relations over time. Sections of the dominant class with relatively less economic capital and greater cultural capital (e.g. professionals,

academics, and artists) endeavour to establish the latter as a rival principle of domination. However, economic capital can also be converted into cultural capital at a better exchange rate than vice versa

Social Capital: The processes and conditions among people and organizations that lead to their accomplishing a goal of mutual social benefit, usually characterized by interrelated constructs of trust, cooperation, civic engagement, and reciprocity, reinforced by networking.

Cultural Capital: the symbols, ideas, tastes, and preferences that can be strategically used as resources in social action.

Symbolic Capital: the body of meanings, representations, and objects held to be prestigious or valuable to a social group.

Class distinction: The differentiation of one social class from another; (also) a point of differentiation between social classes, as a characteristic attitude, behaviour, etc

Cultural imperialism: The influences of an economically dominant culture on others, typically spread through trade and more recently the mass media, and the internet.

Doxa: A psychological state in which all members of a community consider relations natural, including relations of social, economic, and political inequality.

Field: The dynamic configuration, or network, of objective relationships among social agents and positions.

Habitus: A set of norms and expectations unconsciously acquired by individuals through experience and socialization as embodied dispositions, “internalized as second nature”

Practice or praxis: The concept that society is constructed by purposeful, creative agents who bring society to life through talk and action.

Privilege: A special right, advantage, or immunity granted or available only to a particular person or group.

Reflexivity: The effect of the personality or presence of the researcher on what is being investigated.

Symbolic violence: The imposition on subordinated groups by the dominant class of an ideology which legitimates and naturalizes the status quo

Taste: A person's tendency to like or be interested in something.

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10.1 Interviews Subjects

Pre-Survey:

1. BP Interviewed by Ann Roberts in Rosebank on 16.10.2019 recorded on iPhone
2. MM Interviewed by Ann Roberts in Rosebank on 29.08.2019 recorded on iPhone
3. NM Interviewed by Ann Roberts in Rosebank on 24.10.2019 recorded on iPhone

4. AN Interviewed by Ann Roberts in Rosebank on 20.10.2019 recorded on iPhone

Post Survey:

1. NN Interviewed by Ann Roberts in Rosebank on 07.02.2020 recorded on iPhone
2. MM2 (didn't reference in text) Interviewed by Ann Roberts in Rosebank on 07.02.2020 recorded on iPhone
3. KT Interviewed by Ann Roberts in Rosebank on 21.02.2010 recorded on iPhone
4. PK Interviewed by Ann Roberts in Rosebank on 19.02.2020 recorded on iPhone
5. LN Interviewed by Ann Roberts in Cape Town on recorded 14.02.2020 on iPhone
6. VK Interviewed by Ann Roberts in Rosebank on 24.02.2020recorded on iPhone
7. SZ Interviewed by Ann Roberts in Rosebank on 05.03.2020recorded on iPhone

11 Appendix

11.1 Self-Completion Survey

Masters Research Survey - the factors that drive demand for contemporary visual art amongst individual buyers in South Africa.

I am Ann Roberts, a Master's student at the University of the Witwatersrand. I am conducting research into the factors that drive demand for contemporary visual art amongst individual buyers in South Africa. The purpose of the research is to gain knowledge of the contemporary visual art market that could potentially influence policy and strategies to grow the market.
I would like to invite you to assist me by participating in this research. There is no remuneration for participation.

The survey is anonymous, has 27 questions and should take no longer than 5 to 10 minutes to complete.

* Required

1. **1. Age** *
   Mark only one oval.
   - 18 - 29
   - 30 - 39
   - 40 - 49
   - 50 - 59
   - 60 - 69
   - 70+

2. **2. Gender** *
   Mark only one oval.
   - Female
   - Male
   - Gender non conforming
   - Other

3. **3. Race** *
   Mark only one oval.
   - Black
   - White
   - Coloured
   - Asian
   - Mixed Race
   - Other

4. **4. Home Language** *
   Mark only one oval.

   - English
   - Zulu
   - Xhosa
   - Afrikaans
   - Sotho
   - Ndebele
   - Northern Sotho
   - SiSwati
   - Tsonga
   - Tswana
   - Venda
   - Other

5. **5. Nationality** *
   Mark only one oval.

   - South African
   - Afghan
   - Albanian
   - Algerian
   - American
   - Andorran
   - Angolan
   - Antiguans
   - Argentinean
   - Armenian
   - Australian
   - Austrian
   - Azerbaijani
   - Bahamian
   - Bahraini
   - Bangladeshi
   - Barbadian
   - Barbudans
   - Batswana
   - Belarusian
   - Belgian
   - Belizean
   - Beninese

- Turkish
- Tuvaluan
- Ugandan
- Ukrainian
- Uruguayan
- Uzbekistani
- Venezuelan
- Vietnamese
- Welsh
- Yemenite
- Zambian
- Zimbabwean

6. **Do you live in South Africa?** *
   Mark only one oval.
   - Yes
   - No
   - Other: _____

7. **6. Place of residence** *
   Mark only one oval.
   - City
   - Suburb
   - Township
   - Rural
   - Other: _____

8. **7. Occupation and industry** *
   _____

9. **8. Highest level of education completed** *
   Mark only one oval.
   - Primary school
   - High school
   - Tertiary certificate, diploma or trade
   - Bachelors degree
   - Honours
   - Masters or beyond

10. **9. Have you ever bought contemporary art?** *
Mark only one oval.

- ◯ Yes *Skip to question 11.*
- ◯ No *Skip to question 41.*

11. **10. How did you first develop your interest in art?** *
Check all that apply.

- ☐ I studied art at high school or tertiary level
- ☐ I grew up in a household interested in art
- ☐ My friends or colleagues introduced me to art
- ☐ I encountered art in my work environment
- ☐ I encountered art in public spaces
- ☐ Other

12. **11. Please estimate your annual income for 2018** *
Mark only one oval.

- ◯ Less than R 40 000
- ◯ R 41 000 - R 120 000
- ◯ R 121 000 - R 500 000
- ◯ R 501 000 - R 1 000 000
- ◯ More than R 1 000 000

13. **12. How many contemporary art works do you currently own?** *
Mark only one oval.

- ◯ 1 to 10
- ◯ 11 to 20
- ◯ 21 to 50
- ◯ 50 to 100
- ◯ More than 100

14. **13. What are the nationalities of the artists whose work you have bought (Multiple answers possible)** *
Check all that apply.

- ☐ South Africa
- ☐ Rest of Africa
- ☐ USA/Canada
- ☐ Europe
- ☐ Latin America
- ☐ Australasia
- ☐ Other: _____

15. **14. What year did you last buy a work of art?** *

16. **15. How many works did you buy in that year?** *

17. **16. How much did you pay for it/them in Rands? (total) R** *

17. Reasons you buy art

How relevant are the following motives for you when buying contemporary art?

18. **17a. The work challenges my intellect** *

Mark only one oval.

	1	2	3	4	5	
not at all important	◯	◯	◯	◯	◯	extremely important

19. **17b. I want to support the artist** *

Mark only one oval.

	1	2	3	4	5	
not at all important	◯	◯	◯	◯	◯	extremely important

20. **17c. The work expresses something about who I am** *

Mark only one oval.

	1	2	3	4	5	
not at all important	◯	◯	◯	◯	◯	extremely important

21. **17d. The work is a good financial investment** *

Mark only one oval.

	1	2	3	4	5	
not at all important	◯	◯	◯	◯	◯	extremely important

22. **17e. The work will match the decor of the room I wish to hang it in** *
Mark only one oval.

	1	2	3	4	5	
not at all important	◯	◯	◯	◯	◯	extremely important

23. **17h. The work reminds me of a specific place, event, person** *
Mark only one oval.

	1	2	3	4	5	
not at all important	◯	◯	◯	◯	◯	extremely important

24. **17i. The work is an important work in art history / South African history** *
Mark only one oval.

	1	2	3	4	5	
not at all important	◯	◯	◯	◯	◯	extremely important

18. What you look for in a work of art?

25. **18a. A high level of craftsmanship** *
Mark only one oval.

	1	2	3	4	5	
not important at all	◯	◯	◯	◯	◯	extremely important

26. **18b. A concept being explored or story being told** *
Mark only one oval.

	1	2	3	4	5	
not important at all	◯	◯	◯	◯	◯	extremely important

27. **18c. Aesthetically pleasing to me** *
Mark only one oval.

	1	2	3	4	5	
not important at all	◯	◯	◯	◯	◯	extremely important

28. **18d. It reflects on contemporary issues** *
Mark only one oval.

	1	2	3	4	5	
not important at all	◯	◯	◯	◯	◯	extremely important

29. **18e. A gut feeling... I just like it...**
Mark only one oval.

	1	2	3	4	5	
not important at all	◯	◯	◯	◯	◯	extremely important

30. **18f. Other people admire the work** *
Mark only one oval.

	1	2	3	4	5	
not important at all	◯	◯	◯	◯	◯	extremely important

Purchase channels and prices

31. **19. What range of prices have you paid for your artworks? (Multiple answers possible)** *
Check all that apply.

- [ ] under R 7 500
- [ ] R 7 500 - R 30 000
- [ ] R 31 000 - R 120 000
- [ ] R 121 000 - R 500 000
- [ ] Over R 500 000

32. **20. What is the most you've paid for a work of art?** *
Mark only one oval.

- ◯ under R 7 500
- ◯ R 7 500 - R 30 000
- ◯ R 31 000 - R 120 000
- ◯ R 121 000 - R 500 000
- ◯ Over R 500 000

33. **21. From whom/where do you buy art? (Multiple answers possible)** *
Check all that apply.

- [ ] Direct from artists
- [ ] From art galleries
- [ ] From markets
- [ ] From live auctions
- [ ] Online platforms
- [ ] Private sellers and dealers
- [ ] Art Fairs
- [ ] Other

34. **22. How do you inform yourself before buying? (Multiple answers possible)** *
Check all that apply.

- [ ] Artists' and gallerists' website
- [ ] Art appreciation and or art history courses
- [ ] Art magazines, websites and blogs
- [ ] Art consultant(s)
- [ ] private contacts and other buyers/collectors I know
- [ ] Visiting galleries and art institutions
- [ ] Friends
- [ ] Other
- [ ] I do not prepare

35. **23. What medium(s) are the artworks you have bought? (Multiple answers possible)** *
Check all that apply.

- [ ] Painting
- [ ] Sculpture
- [ ] Photography
- [ ] Limited edition prints and other works on paper
- [ ] New media including video
- [ ] Textiles and/or tapestries
- [ ] Ceramics
- [ ] Other: _____

36. **24. Please describe one of your favourite art purchases, include artist, title, medium,size, price and why you bought it...**

37. **25. Rank the following items by order of importance to you?**
Check all that apply.

	1st	2nd	3rd	4th	5th	6th
Owning your own home	☐	☐	☐	☐	☐	☐
Travelling internationally	☐	☐	☐	☐	☐	☐
Owning designer furniture and household goods	☐	☐	☐	☐	☐	☐
Owning and wearing designer clothing and accessories	☐	☐	☐	☐	☐	☐
Supporting your extended family	☐	☐	☐	☐	☐	☐
Owning art	☐	☐	☐	☐	☐	☐

38. **26. Do you have any children?** *
Mark only one oval.

0	1	2	3	4	5	6	7	8	9	10
◯	◯	◯	◯	◯	◯	◯	◯	◯	◯	◯

39. **27. How do you spend your leisure time? (Multiple answers possible)** *
Check all that apply.

- ☐ Attending art events
- ☐ Watching sports
- ☐ Playing or creating music
- ☐ DIY and crafts
- ☐ Dining out and/or entertaining
- ☐ Making your own art
- ☐ Attending other cultural events
- ☐ Participating in sports
- ☐ Reading
- ☐ Other: _____

40. **Please add any other information you believe could be useful to this study.**

Stop filling out this form.

41. **10. Do you think you will buy art in the future?** *
Mark only one oval.

- ◯ Yes
- ◯ No
- ◯ Maybe

42. **11. Why have you never bought art? (Multiple answers possible)** *
Check all that apply.

- ☐ I am not interested in art
- ☐ I cannot afford to buy art
- ☐ I don't know anything about art
- ☐ Other

43. **12. Other reasons why you have never bought art**

44. **13. Rank the following items by order of importance to you?**
Check all that apply.

	1st	2nd	3rd	4th	5th
Owning your own home	☐	☐	☐	☐	☐
Owning designer furniture and household goods	☐	☐	☐	☐	☐
Owning and wearing designer clothing and accessories	☐	☐	☐	☐	☐
Travelling internationally	☐	☐	☐	☐	☐
Supporting your extended family	☐	☐	☐	☐	☐

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